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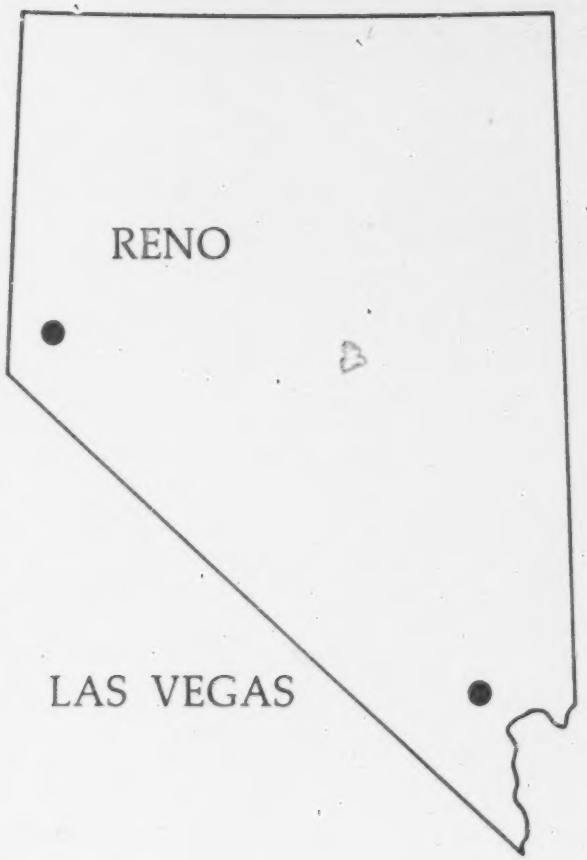
NEVADA



AREA LABOR REVIEW 1986

ECONOMIC DEVELOPMENTS AND 1987 OUTLOOK

NEVADA AREA LABOR REVIEW

ECONOMIC DEVELOPMENTS AND 1987 OUTLOOK

PREPARED BY

EMPLOYMENT SECURITY DEPARTMENT
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NOVEMBER 1986

RICHARD H. BRYAN
Governor

STATE OF NEVADA

STANLEY P. JONES
Executive Director

EMPLOYMENT SECURITY DEPARTMENT
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A MESSAGE FROM THE DIRECTOR

The Area Labor Review is an annual publication prepared by the Employment Security Department. In this the 1986 edition, as in previous years, current National, State and Nevada metropolitan area economic developments are examined. At the same time, 1987 labor market expectations are reviewed. Population and income trends are also presented. Each is accompanied by significant supporting statistical data.

This publication is designed for use by planners, analysts, employers, jobseekers and others who are interested in the Nevada labor market. We sincerely hope that you will find the information valuable.

Please do not hesitate to contact the Employment Security Department if you need additional assistance regarding the State's labor market.

STAN JONES
EXECUTIVE DIRECTOR

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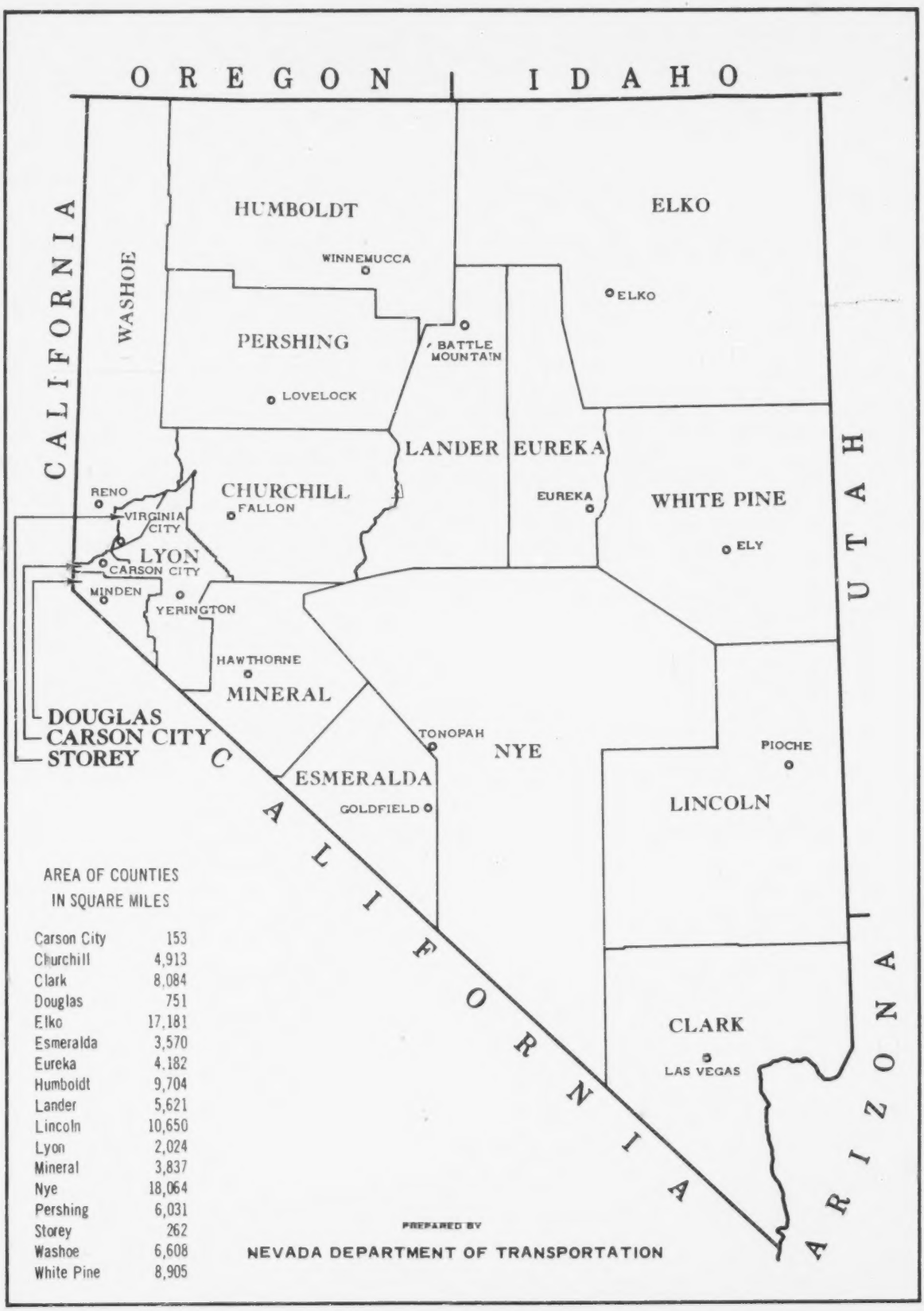


AREA OF COUNTIES
IN SQUARE MILES

Carson City	153
Churchill	4,913
Clark	8,084
Douglas	751
Elko	17,181
Esmeralda	3,570
Eureka	4,182
Humboldt	9,704
Lander	5,621
Lincoln	10,650
Lyon	2,024
Mineral	3,837
Nye	18,064
Pershing	6,031
Storey	262
Washoe	6,608
White Pine	8,905

PREPARED BY
NEVADA DEPARTMENT OF TRANSPORTATION

NATIONAL AND STATE ECONOMIC DEVELOPMENTS AND OUTLOOK

THE NATIONAL OUTLOOK

Overall, 1986 has been a good year economically for Nevada--especially in terms of its labor market. The variable which best reflects the health of the labor market, the unemployment rate, decreased throughout the year and by September was at 5.5 percent, the lowest level in six years. Highlighting this improvement was the fact the September rate was 2.6 percentage points below September of 1985, with nearly 11,000 fewer individuals unemployed.

Behind this improvement was the continued growth in the job base, with an estimated increase of nearly 20,000 jobs during the 1985-86 period. While the rate of growth (in the neighborhood of four percent) was relatively slow by past standards, labor market improvements were quite noticeable because of an even slower increase in the labor force. Both new job seekers and many of the existing unemployed were able to obtain employment.

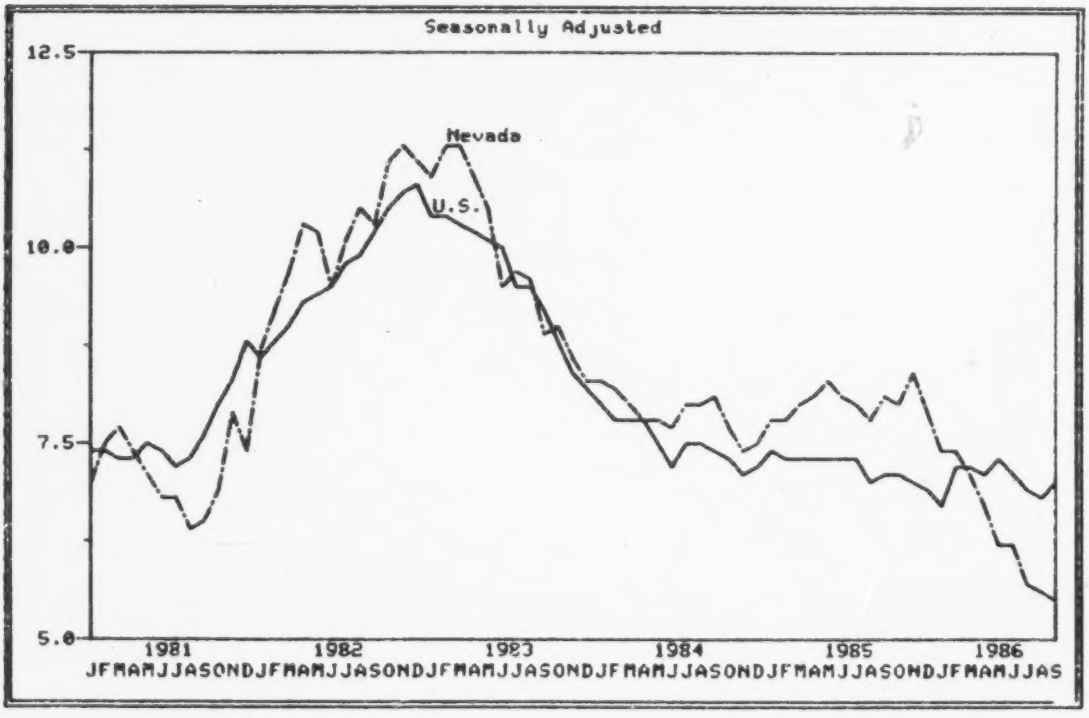
Job growth wasn't, however, evenly shared by all industrial sectors. Mining and manufacturing experienced little growth, both reflecting difficulties on the national and international scene. On the other hand, the construction sector, benefiting from lower interest rates, experienced significant gains. In between these two extremes was the hotel, gaming and recreation industry, whose status has been experiencing a transition to a "mature" industry with its associated slower growth rate. In addition, such things as competition with gaming from outside the State and shrinking profit margins have resulted in the industry taking steps to reduce its labor

costs with the result that the industry can no longer be expected to be at the forefront of development with rapid employment gains. However, the industry continues to lead the way in the absolute number of new jobs being created, though at a percentage rate considerably below past rates of growth.

While the Nevada employment picture has been good through 1986, there are some concerns as to 1987. These primarily relate to the national economy and its impact on the State's economic picture. As the following chart indicates, the national unemployment rate has been

Figure 1

NEVADA AND NATIONAL UNEMPLOYMENT RATES



Source: Bureau of Labor Statistics; Employment Security Research.

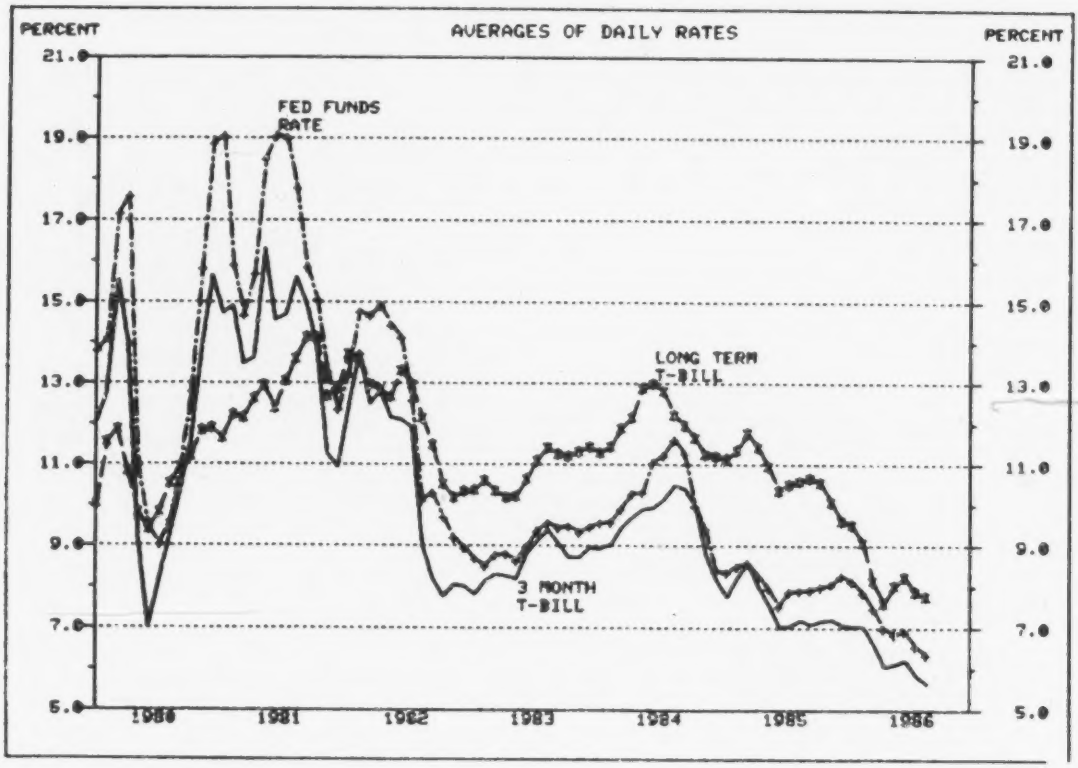
pegged in the 7 percent range for most of the past eighteen months and only recently has it dropped below this level. Optimism expressed early in 1986 for a significant recovery during the second half has eroded, and to some degree has clouded the 1987 outlook. Confusing the picture is the fact that the variables behind the earlier optimism--the drop in interest rates, the decline of the dollar vis-a-vis foreign currencies, and the substantial drop in the rate of inflation--essentially remain unchanged.

While the positive factors remain in place, there have been several developments which have restricted the anticipated economic expansion. For example, although the dollar has dropped substantially against foreign currencies, exports have not surged as our major trading partners (i.e., Japan and West Germany) have been hesitant in taking measures to stimulate their respective economies. The adverse impact of the precipitous drop in oil prices on oil producing areas was also underestimated.

A more subtle problem is with interest rates. As the chart indicates, nominal interest rates have dropped substantially since 1984 as the Federal Reserve has accelerated the growth of the money supply with the intent of stimulating the economy. While this has prompted considerable spending by consumers, especially in the housing sector, it has not had a corresponding impact on business investment. Unlike consumers, businesses tend to have more investment alternatives and are more motivated by real interest rates which take into account the rate of inflation. Unfortunately, real interest rates are running at high levels as the rate of inflation has dropped considerably faster than have nominal interest rates.

Figure 2

YIELDS ON SELECTED SECURITIES



Source: Economic Indicators by the Council of Economic Advisors.

However, most analysts anticipate that 1987 will be a year of economic expansion, although the rate of growth will be less than was projected earlier. The following forecast from the Congressional Budget Office (The Economic and Budget Outlook: An Update, Congress of the United States, August, 1986) is presented as an example:

> *The Congressional Budget Office (CBO) projects that economic growth will pick up in the year ahead, with a steady decline in unemployment. Inflation rates are expected to increase as oil prices stabilize and the effects of rising import prices begin to spread through the economy. The prospects of lower federal deficits have paved the way for declines in the value of the dollar and in interest rates.*

CBO is forecasting the rate of growth in real GNP to increase from an estimated 2.9 percent in 1986 (fourth quarter to fourth quarter) to 3.5 percent in 1987. With the speed-up in economic activity, unemployment is expected to decline from an estimated 7.0 percent (annual average) in 1986 to 6.7 percent in 1987.

Uncertainties surrounding this forecast include the following: (1) the potential negative impact of the restrictive shift in fiscal policy mandated by the Balanced Budget Act (the Gramm-Rudman-Hollings bill), and (2) the effects of the tax reform legislation now before Congress. Obviously, changes in the above toward the negative side would impact the forecast accordingly.

The Nevada Outlook

Given the obvious correlation between the Nevada and national economies, Nevada should also benefit if this forecast proves out. In some respects, though, the Nevada forecast may be somewhat more optimistic. As noted in the unemployment rate chart previously presented, Nevada has recently experienced a lower unemployment rate than has the nation as a whole. Rather than being a statistical fluke, this probably is the result of the State directly benefiting from lower oil prices, while experiencing none of the negative factors currently being felt by the oil producing areas. On the other hand, there have been some adverse elements surfacing in the Nevada economy that should not be overlooked. These are mainly associated with the gaming sector which has experienced disappointing returns to date in gross gaming revenues, especially in the northern part of the State.

In terms of labor market activity, it doesn't appear that the unemployment rate will continue its rapid downward trend. This is not indicative of any weakening in the overall situation, but reflects the fact that the cyclical component of unemployment (Note: unemployment is normally broken down into seasonal, frictional, and cyclical components) is probably reduced to the point that further significant reductions are unlikely. A more realistic forecast is for the unemployment rate to fluctuate in the 5.5 to 6.5 percent range with industrial employment growing at a 4.0 to 4.5 percent rate.

TABLE 1

Nevada
*Establishment-Based Industrial Employment***
1985-1987

Industry	1985*	1986(e)	Percent Change 1985-1986	1987(e)	Percent Change 1986-1987
TOTAL	446,400	465,000	4.2	483,100	3.9
Mining	6,100	6,300	3.3	6,500	3.2
Construction	23,900	25,800	7.9	27,000	4.7
Manufacturing	21,900	22,700	3.7	23,600	4.0
TCPU	25,300	26,000	2.8	26,600	2.3
Trade	90,900	94,800	4.3	98,800	4.2
FIRE	21,300	22,100	3.8	22,800	3.2
Service	196,300	206,800	5.3	215,600	4.3
HGR	125,200	131,900	5.4	137,500	4.2
Government	60,700	60,500	-0.3	62,200	2.8

* Revised annual averages previously unpublished.
** Reflects employment by place of work. Does not necessarily coincide with labor force concept.
e = Estimate

TCPU = Transportation/Communications/Public Utilities
FIRE = Finance/Insurance/Real Estate
HGR = Hotels/Gaming/Recreation

SOURCE: Employment Security Research

However, it should be noted that the optimism about the national economic situation is not shared by all. Serious questions remain about the federal budget deficit, the trade imbalance, the agricultural sector, and the international situation in general. Any serious deviation in any of the above could seriously impact the national economy, and ultimately the Nevada economic picture.

NEVADA POPULATION FORECAST

Nevada begins the second half of the eighties with expectations for continued rapid population growth. The trend of migration into the State, well-established in the 1970s and early 1980s, will continue to significantly add to the State's population. Total population is estimated to reach one million people in 1986 (table 3), an increase of 25 percent over the 1980 census.

Between now and 1990, Nevada is expected to sustain a relatively high yearly rate of growth (2.7 percent). The Las Vegas Metropolitan Statistical Area (MSA)[1], which makes up about 60 percent of Nevada's population, will grow at a slightly slower rate than the State as a whole. Eight of Nevada's 17 counties, including the Reno MSA are expected to grow at rates faster than the State average. Douglas and Nye counties are expected to increase their population most rapidly, both averaging growth rates of over 3 percent.

What does a rapidly growing population mean for Nevada? U.S. Census Bureau analysis shows that not only is Nevada's population growth rate currently one of the highest in the nation, but that

[1] Metropolitan statistical area is defined as Clark County for the Las Vegas MSA and as Washoe County for the Reno MSA. This usage is consistent throughout the publication.

Nevada is one of two states that realized increases in its elderly population (65 years and older) of over 30 percent between 1980 and 1984. According to Census Bureau state estimates, this age group increased by 21,000 people in Nevada. And the size of Nevada's elderly population is expected to continue to substantially increase as a result of both migration and the aging of "baby boomers."

Nationally, the fastest growing age groups are 35-44 years and 85 years and older. Both of these groups increased by 23.9 and 21.0 percent, respectively. At the same time, both the 5-17 and 18-24 age groups experienced declines, with the 5-17 age group declining most rapidly (-5.3 percent). However, as table 2 indicates, this was not the case in Nevada. Nevada's school-age population (5-17) increased by 2.6 percent and the young adult population (18-24) increased by 4.1 percent, although the relative proportion of these age groups in the population actually declined somewhat. The 25-44 age group also experienced a substantial increase, as did the under 5 group.

TABLE 2

Nevada's Resident Population
Age Components
1980-1984

	Percent Increase 1980-1984	Percent Distribution 1984	Percent Distribution 1980
TOTAL	13.8	100.0	100.0
Under 5	25.2	7.7	7.0
5 to 17	2.6	18.0	19.9
18 to 24	4.1	12.0	13.2
25 to 44	18.4	32.6	31.3
45 to 64	12.5	20.1	20.4
65+	32.2	9.5	8.2

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, No. 970, State Population Estimates, by Age and Components of Change: 1980 to 1984, U.S. Government Printing Office, Washington, D.C., 1985.

TABLE 3
RESIDENT POPULATION
ESTIMATES AND PROJECTIONS
1970-2000
(July 1)

	Census 2/ 1970	Census 2/ 1980	Average Annual Growth 1970-80	1984	1985	Average Annual Growth 1980-85	1986(e)	1987(e)	1990(e)	2000(e)	Average Annual Growth 1985-90	Average Annual Growth 1990-2000
United States 1/	203,302	226,546	1.1%	236,495	238,740	1.0%	240,330	242,560	249,130	267,430	0.9%	0.7%
Nevada	488,738	800,508	5.1	937,150	975,615	3.8	1,001,530	1,028,130	1,112,250	1,421,680	2.7	2.5
Las Vegas MSA*	273,288	463,087	5.4	549,730	575,610	4.2	590,530	605,840	654,160	831,080	2.6	2.4
Reno MSA*	121,068	193,623	4.8	218,900	226,580	3.0	232,830	239,260	259,600	332,940	2.8	2.5
Carson City	15,468	32,022	7.6	34,750	35,400	1.9	36,440	37,500	40,890	55,240	2.9	3.1
Churchill	10,513	13,917	2.8	14,950	15,340	1.9	15,730	16,140	17,410	22,540	2.6	2.6
Douglas	6,882	19,421	10.9	22,450	23,790	3.9	24,600	25,440	28,140	35,030	3.4	2.2
Elko	13,958	17,269	2.2	22,025	23,400	6.0	24,050	24,710	26,820	34,910	2.8	2.7
Esmeralda	629	777	2.1	1,500	1,400	11.9	1,420	1,440	1,500	1,730	1.3	1.4
Eureka	948	1,198	2.4	1,450	1,650	6.3	1,670	1,680	1,730	2,220	1.0	2.5
Humboldt	6,375	9,449	4.0	11,900	12,010	4.7	12,330	12,550	13,680	17,940	2.6	2.8
Lander	2,666	4,076	4.3	4,610	4,550	2.1	4,660	4,770	5,110	6,390	2.4	2.2
Lincoln	2,557	3,732	3.9	4,150	4,250	2.5	4,380	4,510	4,920	6,400	3.0	2.7
Lyon	8,221	13,594	5.2	16,595	17,595	5.0	18,050	18,530	20,010	25,960	2.6	2.6
Mineral	7,051	6,217	(1.3)	6,080	6,100	(0.4)	6,270	6,450	7,020	9,280	2.9	2.8
Nye	5,599	9,048	4.9	14,850	14,850	9.9	15,310	15,790	17,310	22,450	3.1	2.6
Pershing	2,670	3,408	2.5	3,680	3,650	1.3	3,720	3,800	4,030	4,910	2.0	2.0
Storey	695	1,503	8.0	1,800	1,800	3.5	1,860	1,910	2,090	2,850	3.1	3.1
White Pine	10,150	8,167	(2.2)	7,730	7,640	(1.3)	7,670	7,710	7,810	9,820	0.4	2.3

1/ In Thousands
2/ April 1

Note: Totals may not add due to rounding; growth rates based on unrounded data; brackets represent negative growth rates.

* Metropolitan Statistical Area

e - Estimate

Source: U.S. Department of Commerce, Bureau of the Census; Nevada State Office of Community Services.

The accelerated growth and changing age composition of Nevada's population will impact government and business planning and delivery of services in several areas, including education, the health care industry, and the labor market.

INCOME AND EARNINGS INDICATORS

Measures of personal income are frequently used to evaluate national, state, and local economic performance. Personal income is defined as income received by residents of an area from all sources. These include wages and salaries, other labor income, proprietors' income, personal dividend income, personal interest income, rental income, and transfer payments. Total personal income is the sum of all sources before deduction of taxes but after deductions for social insurance programs; per capita personal income is an average income measure and is derived by dividing total personal income by a mid-year population estimate.[2]

In Nevada, personal income has been steadily rising by robust percentages since 1980. Between 1980 and 1985 total personal income has increased, on average, 8.1 percent per year. However, this rate may be slowing somewhat. As indicated in table 4, total income increased by 7.6 percent between 1984 and 1985, about 2 points less than the previous year's percentage increase for the State. Nationally, total personal income increased by 6.7 percent, almost 4 points down from the previous year's increase. However, the inflation rate as measured by the U.S. All-Urban Consumer Price Index has also dropped considerably, averaging about 3.7 percent over the last two

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[2] U.S. Department of Commerce, Bureau of Economic Analysis

years (1983 - 1985). Relatively low inflation has been one of several factors holding down wage and salary increases, the major component of total personal income.

In 1985, per capita personal income for Nevadans ranked twelfth highest in the Nation. Between 1984 and 1985, per capita personal income rose 5.4 percent, staying 4 percent above the national average.

TABLE 4

Total and Per Capita Personal Income
United States and Nevada
1983 - 1985

	1983	1984	1985
Total Personal Income*			
United States	$2,833	$3,101	$3,311
Nevada	11.5	12.6	13.6
Las Vegas MSA	6.3	6.8	N/A
Reno MSA	3.0	3.2	N/A
Per Capita Personal Income			
United States	$12,093	$13,114	$13,867
Nevada	12,857	13,740	14,488
Las Vegas MSA	11,914	12,729	N/A
Reno MSA	14,059	15,348	N/A

* Billions of dollars

Source: Survey of Current Business, U.S. Department of Commerce, Bureau of Economic Analysis, April 1986, August 1986.

Personal income data for both the Las Vegas and Reno metropolitan areas, currently available for 1984, show substantial percentage increases over 1983 levels. Total personal income increased by 6.9 percent in the Las Vegas MSA and by 9.9 percent in the Reno MSA. The margin between per capita income in the two areas continued to widen, with per capita income rising by 9.2 percent in the Reno area compared

to a 6.8 percent increase in the Las Vegas area. However, as the Las Vegas area economy continues to "boom" in comparison to the Reno area, the disparity in per capita income levels between the two areas will probably narrow over the next several years.

Table 5 shows 1984 total and per capita personal income for the remaining Nevada counties.

TABLE 5

Total and Per Capita Personal Income by County 1984

	Total Personal Income (thousands)	Percent Increase 1983 - 1984	Per Capita Personal Income	Percent Increase 1983 - 1984
Carson City	477,093	10.4%	13,284	8.9%
Churchill	157,657	13.6%	10,970	11.8%
Douglas	347,233	12.3%	16,559	9.7%
Elko	260,322	10.0%	12,840	9.1%
Esmeralda	15,246	5.0%	11,032	2.7%
Eureka	16,809	29.1%	12,753	22.8%
Humboldt	107,510	8.1%	9,836	7.7%
Lander	48,671	6.6%	11,099	9.0%
Lincoln	42,078	17.7%	11,866	20.8%
Lyon	175,495	11.9%	11,183	8.8%
Mineral	72,954	8.8%	12,127	6.4%
Nye	166,119	12.8%	11,509	4.9%
Pershing	38,948	12.2%	10,944	14.9%
Storey	21,555	10.5%	11,955	9.1%
White Pine	89,412	2.9%	10,872	6.0%

Source: U.S. Department of Commerce, Bureau of Economic Analysis, April 1986

INDUSTRY EARNINGS

Workers' earnings by industry also indicate important developments in the Nevada economy. Table 6 details the changes in the average wage of workers by industry between 1984 and 1985.

Average wages for covered workers statewide topped $18,000 in

1985, increasing by 3.4 percent over 1984 average wages. In general, 1985 industry average wage increases were more robust compared to the relatively moderate increases of 1984. This reflects, to a certain extent, the increased activity in industries other than services, although this sector continues to have a major impact on the State's economy. For example, in the past year gold mining ventures have made up some of the losses in employment experienced in previous years from "busts" in molybdenum and copper mining. In the finance/insurance/real estate and construction industries, an average of 44 and 145 firms, respectively, were added to accommodate the demand created from drops in mortgage interest rates. Therefore, it is not surprising that, statewide, the largest increases in average wages were in both mining (7.3 percent) and finance/insurance/real estate (5.3 percent). Construction wages also increased slightly (0.8 percent), after declining two years in a row.

Looking at average wage increases by area further pinpoints strengths in local economies. As examples, average construction wages in the Las Vegas MSA increased by 2.4 percent, a complete reversal of the decline experienced between 1983 and 1984. At the same time, average construction wages declined slightly (-0.7 percent) in Reno. Trade industry average wages increased by a robust 6.4 percent in the Reno area compared to a 2.8 percent increase in Las Vegas. And, in the services sector, which includes not only hotels/gaming/recreation, but also business and personal services, healthy gains were made in average wages (excluding gratuities) and in the average number of firms in both metropolitan areas, although service industry average wages remain about 12 percent higher in the Las Vegas area than in the Reno area.

TABLE 6

Average Number of Firms and Average Annual Wage by Industry

	1984		1985			
	Average Firms	Average Wages	Average Firms	Average Wages	% Change Wage	% Change Firms
TOTAL						
Nevada	22,794	$17,565	23,626	$18,163	3.7%	3.4%
Las Vegas	11,051	$17,530	11,402	$18,037	3.2%	2.9%
Reno	6,818	$17,323	7,023	$18,076	3.0%	4.3%
MINING						
Nevada	369	$27,817	369	$29,837	0.0%	7.3%
Las Vegas	28	$27,873	28	$29,599	0.0%	6.2%
Reno	84	$28,265	84	$31,496	0.0%	11.4%
CONSTRUCTION						
Nevada	2,898	$24,033	3,043	$24,215	5.0%	0.8%
Las Vegas	1,410	$23,938	1,457	$24,511	3.3%	2.4%
Reno	781	$24,186	810	$24,013	3.7%	-0.7%
MANUFACTURING						
Nevada	868	$20,548	914	$21,104	5.3%	2.7%
Las Vegas	374	$21,176	402	$21,750	7.5%	2.7%
Reno	303	$21,951	310	$22,272	2.3%	1.5%
TRANSPORTATION/COMMUNICATIONS/PUBLIC UTILITIES						
Nevada	946	$22,123	976	$22,658	3.2%	2.4%
Las Vegas	429	$21,894	442	$22,236	3.0%	1.6%
Reno	278	$22,567	283	$23,491	1.8%	4.1%
TRADE						
Nevada	6,699	$13,406	6,883	$13,932	2.7%	3.9%
Las Vegas	3,277	$13,395	3,381	$13,764	3.2%	2.8%
Reno	1,986	$14,234	2,024	$15,146	1.9%	6.4%
FINANCE/INSURANCE/REAL ESTATE						
Nevada	2,236	$17,784	2,280	$18,733	2.0%	5.3%
Las Vegas	1,152	$17,765	1,160	$18,898	0.7%	6.4%
Reno	716	$18,295	738	$19,180	3.1%	4.8%
SERVICES						
Nevada	7,799	$16,466	8,131	$16,981	4.3%	3.1%
Las Vegas	4,079	$16,731	4,208	$17,219	3.2%	2.9%
Reno	2,483	$14,809	2,585	$15,386	4.1%	3.9%
HOTELS/GAMING/RECREATION						
Nevada	1,056	$14,181	1,050	$14,586	-0.6%	2.9%
Las Vegas	552	$15,251	507	$15,699	-4.2%	2.9%
Reno	273	$12,531	282	$12,979	3.3%	3.6%
GOVERNMENT						
Nevada	463	$20,740	479	$21,897	3.5%	5.6%
Las Vegas	86	$21,706	87	$22,504	1.2%	3.7%
Reno	72	$21,335	73	$22,744	1.4%	6.6%
OTHER*						
Nevada	516	N/A	551	N/A	6.8%	--
Las Vegas	216	N/A	237	N/A	9.7%	--
Reno	115	N/A	116	N/A	0.9%	--

* Other includes agricultural services and miscellaneous firms.
Source: Employment and Payrolls 1984 and 1985, Employment Security Research.

Table 7 shows the distribution of earnings by industry for the State and counties.

TABLE 7

Percent of Earnings by County and Selected Industries 1985

	Mining	Construction	Manufacturing	TCPU	Trade	FIRE	Services	Government
NEVADA	2.3	7.2	5.8	6.7	15.7	4.9	40.6	16.3
Carson City	0.4	6.0	17.4	3.4	13.7	2.5	15.8	40.8
Churchill	1.6	8.5	6.9	3.3	16.2	3.1	21.7	38.8
Clark	0.2	7.9	3.8	7.0	16.3	5.4	44.5	14.9
Douglas	0.7	4.2	11.7	3.1	5.4	5.2	62.3	7.4
Elko	13.7	7.6	1.5	5.9	13.2	2.9	32.5	22.7
Esmeralda	71.7	*	*	*	*	*	3.3	13.2
Eureka	*	*	*	0.7	*	0.4	6.7	7.0
Humboldt	14.5	14.3	2.4	10.8	13.8	2.1	20.7	21.4
Lander	68.1	*	0.3	2.6	5.2	1.1	5.3	16.4
Lincoln	2.3	*	0.1	1.5	2.9	0.7	75.6	16.7
Lyon	6.0	9.7	20.2	6.9	15.3	2.6	16.6	22.7
Mineral	20.8	1.5	0.4	3.4	6.8	1.1	43.2	22.9
Nye	10.5	2.1	0.5	1.3	2.0	1.7	76.3	5.6
Pershing	30.5	0.7	4.6	10.3	9.5	1.5	17.2	25.7
Storey	40.3	*	*	14.0	0.0	*	14.4	15.6
Washoe	1.0	6.7	8.6	8.2	19.2	5.6	34.3	16.4
White Pine	28.9	4.1	1.6	6.2	17.5	2.2	12.5	27.1

* Less than 3 firms

TCPU = Transportation/Communications/Public Utilities
FIRE = Finance/Insurance/Real Estate

Source: Employment and Payrolls 1985, Employment Security Research

ECONOMIC DEVELOPMENTS AND OUTLOOK LAS VEGAS MSA [3]

The business climate in the Las Vegas Metropolitan Statistical Area (MSA) remained very upbeat as the area entered the Fall of 1986. So far, business during the year has been good as a record number of visitors have chosen Las Vegas as their destination. Indicators which provide insight into the health of the area economy have, for the most part, reflected very positive signs. This has manifested itself in many business expansions, renovations and openings of new firms during the past several months. Numerous new enterprises in industries outside of the tourist oriented service sector have also located here. Many companies are becoming aware of Nevada's and Las Vegas' positive business climate and are choosing to start-up or relocate business ventures here.

The good health of the area economy is also apparent by a significant increase in the number of job orders received by the local Employment Security Department offices. For fiscal year 1985 (June 1984 to July 1985) 16,714 job orders were placed by local employers. In comparison, during fiscal year 1986, a total of 21,268 job orders were logged into the local offices. This is an increase of 27.2 percent in the number of job orders received.

A large portion of the credit for a record year in tourism is attributed to the strength of the surrounding states' economies. States within the Western Region account for over 70 percent of the visitors to Las Vegas and nearly three-fourths of these visitors are

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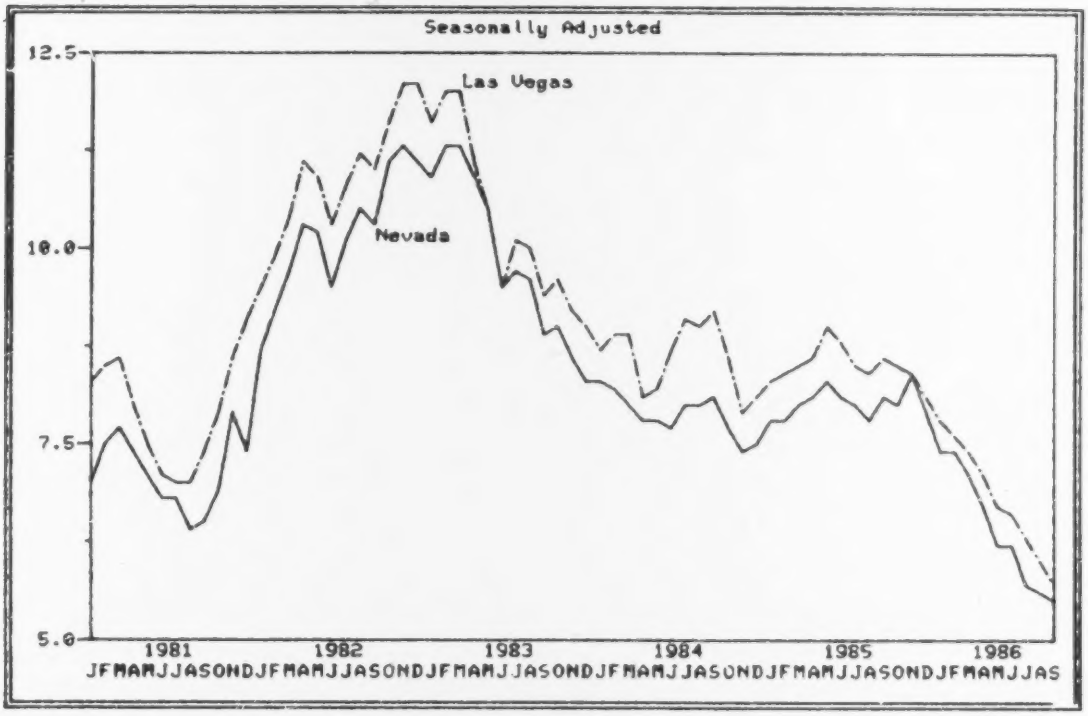
[3]Metropolitan statistical area is defined as Clark County for the Las Vegas MSA and as Washoe County for the Reno MSA. This usage is consistent throughout the publication.

from California, mainly southern California. Unemployment levels have been consistently below national rates in the Golden Bear State. Recently released personal income data show healthy gains for California residents, who had a 1985 per capita personal income of $16,065, sixth highest in the nation.

Area Unemployment. The strength in the Las Vegas MSA economy has been reflected by a tightening in the area's labor market. Unemployment, which remained relatively high during 1985, began to decline in 1986. And by September, joblessness was at 5.7 percent, the lowest unemployment rate since March 1980, with 16,700 people out of work.

FIGURE 3

Nevada and Las Vegas MSA Unemployment Rates



SOURCE: Employment Security Research, Nevada Employment Security Department.

By comparison, the California unemployment rate for September was 6.4 percent and unemployment throughout the United States was 7.0 percent. The Las Vegas unemployment rate for 1986 should reflect a substantial decline, averaging 6.4 percent for the year compared to 8.5 percent for 1985.

Figure 3 shows how the Las Vegas unemployment rate has steadily decreased during the year. Because of certain characteristics of the Las Vegas labor force, such as high turnover associated with many service industry jobs, the area's unemployment rate is traditionally somewhat higher than the statewide rate. This situation still continues. However, note the dramatic improvement in unemployment since the 1982 recession when 12.1 percent or nearly 40,000 people were without jobs.

Labor Force. During 1985, labor force gains were only 2.4 percent, considerably less than the long term growth rate of 5.8 percent. However, during the first nine months of 1986 labor force growth has been somewhat stronger. For the year, it is estimated labor force growth will be around 2.6 percent.

TABLE 8

Las Vegas MSA Labor Force Summary

	1984	1985	% Change	1986(e)	% Change
Total Labor Force	284.4	291.1	2.4%	298.7	2.6%
Unemployment	24.1	24.8	2.9%	19.1	-23.0%
Unemployment Rate	8.5%	8.5%	---	6.4%	---
Total Employment*	249.7	266.3	6.6%	279.6	5.0%

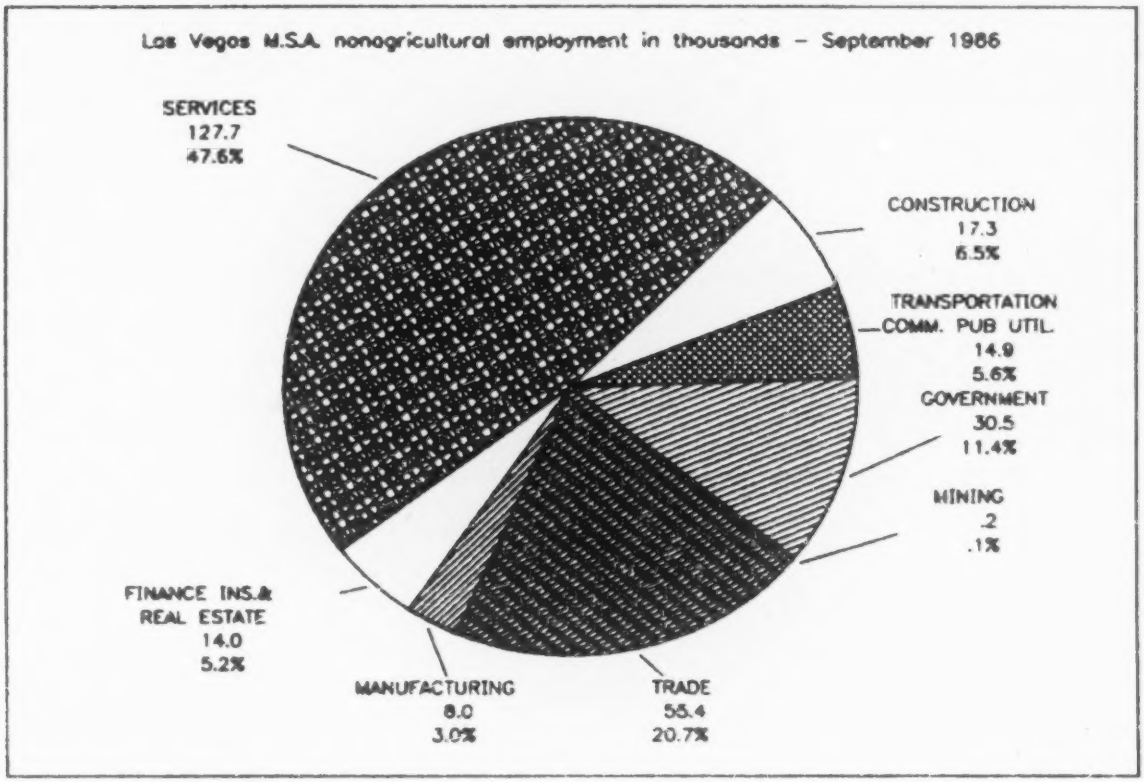
* Total Employment adjusted by Census relationships to reflect number of persons by place of residence.
e = Estimate.

SOURCE: Employment Security Research, Nevada Employment Security Department.

Establishment-Based Industrial Employment. Employment levels during 1985 averaged 246,600 jobs. This was an increase of 13,100 jobs during the year for an annual growth rate of 5.6 percent. By September of 1986, jobs reached a new high totaling 268,000, a 4.2 percent increase over the same month a year ago. This increase is somewhat less than the long term annual average growth rate of 5.1 percent experienced during the past 10 years. However, that period included the extremely fast growth of the late 1970s boom period.

FIGURE 4

Las Vegas MSA
Employment By Industrial Sector



SOURCE: Employment Security Research, Nevada Employment Security Department.

During the first nine months of 1986, the service industry still dominated the job scene as tourism, with it's associated gaming, continued to be the area's economic mainstay. Trade, the second largest industry, also has a number of jobs dependent upon tourism. Figure 4 reflects that over two-thirds of the total number of jobs were in the service and trade industries. Note that manufacturing accounted for just over three percent of the total number of jobs.

TABLE 9

LAS VEGAS MSA
Establishment-Based
Industrial Employment#
(Percent Distribution)
1983-1986

	1983	1984	1985	1986(e)
Total	100.0%	100.0%	100.0%	100.0%
Mining	.1	.1	.1	.1
Construction	5.3	5.7	5.8	6.1
Manufacturing	3.2	3.2	3.2	3.1
TCPU*	6.3	6.1	5.8	5.7
Trade	20.8	20.9	21.2	21.2
Retail Trade	17.8	17.7	17.8	17.9
FIRE**	4.8	4.9	5.1	5.1
Service	47.2	47.1	46.9	47.0
HGR***	31.9	31.5	31.6	31.6
Government	12.3	12.0	11.9	11.7

\# Reflects employment by place of work. Does not necessarily coincide with labor force concept. Includes multiple job holders.
* Transportation/Communication/Public Utilities.
** Finance/Insurance/Real Estate.
*** Hotel/Gaming/Recreation
e = Estimate.

SOURCE: Employment Security Research, Nevada Employment Security Department.

The recent emphasis placed on economic development suggests that the job mix or relative industrial share of jobs should be changing,

as greater diversification indicates less dependence on the gaming industry. However, the relative percentage share of employment by industry over the past few years shows there has been some subtle shifts, but generally, the industry mix has been fairly constant. The construction and finance/insurance/real estate industries have increased their relative share of employment by eight-tenths and three-tenths of a percent respectively. On the other hand, transportation/communication/public utilities and government have accounted for a smaller share of total employment over the past few years. This is reflected by the data in table 9. This underscores the fact that diversification efforts encompass a long-term planning horizon.

As one would expect, the concentration of Las Vegas jobs compared to total jobs statewide is fairly predictable. Services, with it's extensive hotel/casino sector represents a relatively higher proportion of jobs in the area than these jobs statewide. A good way to review these industrial concentrations is by computing location quotients. A location quotient is derived by dividing the Las Vegas industrial employment percent distribution by the statewide industrial employment percent distribution. If the resulting quotient is equal to one, the industrial employment concentration in Las Vegas and the State is the same. A number greater than one indicates that there is a larger concentration of that industry's jobs in the area than statewide. A number less than one indicates a smaller concentration in the Las Vegas area. Table 10 shows the 1985 Las Vegas industrial location quotients.

The location quotient table not only reflects that the service industry, with it's tourist oriented businesses, is more prominent in

the Las Vegas economy but so is finance/insurance/real estate, retail trade, transportation/communication/public utilities and construction. However, the job concentrations in mining, manufacturing, wholesale trade and government are less than the statewide job concentrations. Further, this suggests high service job concentrations makes shifting job shares using diversification a significant task.

TABLE 10

1985
Nevada and Las Vegas MSA
Establishment-Based
Industrial Employment#
Las Vegas MSA Location Quotient

	Nevada		Las Vegas MSA		Las Vegas MSA Location Quotient
	Number	Percent	Number	Percent	
Total	446,400	100.00%	246,700	100.00%	---
Mining	6,100	1.36	300	.12	.09
Construction	23,900	5.35	14,300	5.80	1.08
Manufacturing	21,900	4.90	7,800	3.16	.65
TCPU*	25,300	5.68	14,400	5.84	1.03
Trade	90,900	20.36	52,200	21.16	1.04
Wholesale	15,900	3.56	8,300	3.36	.94
Retail	75,000	16.80	43,900	17.80	1.06
FIRE**	21,300	4.77	12,600	5.11	1.07
Service	196,300	43.98	115,800	46.93	1.07
HGR***	125,500	28.11	77,900	31.60	1.12
Government	60,700	13.60	29,300	11.88	.87

\# Reflects employment by place of work. Does not necessarily coincide with labor force concept. Includes multiple job holders. This data is revised 1985 data, previously unpublished.

* Transportation/Communication/Public Utilities
** Finance/Insurance/Real Estate
*** Hotel/Gaming/Recreation

Source: Employment Security Research, Nevada Employment Security Department.

Since the beginning of the decade the overall industrial concentration of jobs has not changed to any great degree. Mining has declined somewhat in importance while industries such as finance/ insurance/real estate, construction, and transportation/communication/ public utilities have slightly increased in the overall job scene.

THE 1987 OUTLOOK

Economic developments in the Nevada and Las Vegas MSA during 1987 will greatly depend upon national and regional conditions, especially the economic health of the neighboring states. Despite some concerns about the national economic outlook, Employment Security Department economists feel positive about Nevada in 1987. The 1987 outlook for Las Vegas is also one of significant growth.

With continued low energy costs and the lower value of the dollar on the international market, travel to the area will continue at record levels. The labor force should continue to grow at a moderate pace and the unemployment rate is expected to be in the 6.3 to 6.7 percent range. Job levels will continue to expand at a moderate, but steady rate. It is anticipated that establishment-based industrial employment will grow around 4.5 percent in 1987.

Employment Review And Outlook By Industry. Table 10 presents the employment levels for the past several years and estimates for the upcoming year.

In general, gains in mining, construction, manufacturing and service are expected to be significantly higher than overall growth. It is further anticipated that transportation/communication/public utilities, finance/insurance/real estate and government shall expand

at a rate slower than the overall growth in jobs. The following sections are a more detailed look at each industry's prospects.

Mining. The mining industry is a relatively small part of the area economy. Even though jobs are expected to increase by 33.3 percent in 1987, the employment gain is only 100 jobs. This increase, however, is a reflection of the strength of the mining industry in rural Nevada where significant activity has been underway during recent years. Many of the job gains in the Las Vegas area will be either in administrative offices or jobs related to the construction industry such as gravel pit operations.

TABLE 11

Las Vegas MSA
Establishment-Based
Industrial Employment#
1984-1987 Annual Averages
(In Thousands)

	1984	1985	1986(e)	1987(e)	Percent Change 1986-1987
Total	233.5	246.6	259.0	270.4	4.4%
Mining	.3	.2	.3	.4	33.3
Construction	13.3	14.3	15.8	16.6	5.1
Manufacturing	7.5	7.8	8.1	8.6	6.2
TCPU*	14.2	14.4	14.7	15.1	2.7
Trade	48.8	52.2	55.0	57.5	4.5
FIRE**	11.5	12.6	13.2	13.7	3.8
Service	109.8	115.8	121.7	127.4	4.7
HGR***	73.6	77.9	81.9	85.7	4.6
Government	28.1	29.3	30.2	31.1	3.0

Annual averages are revised, previously unpublished numbers. Reflects employment by place of work. Does not necessarily coincide with the labor force concept. Includes multiple job holders.

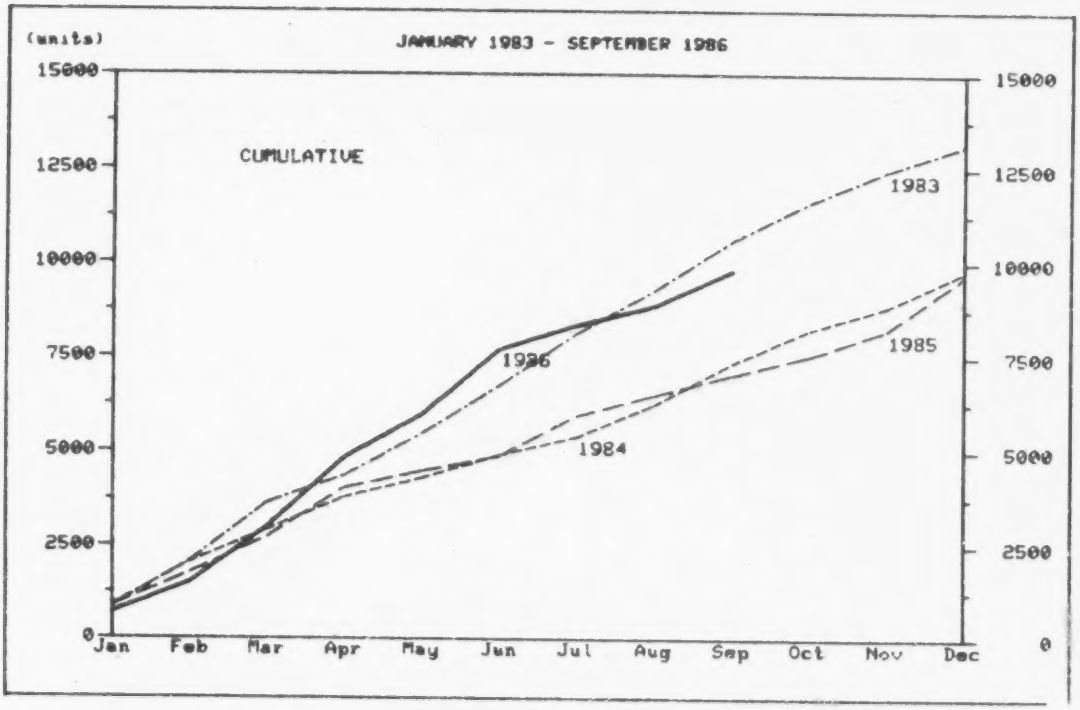
e = Estimate
* Transportation/Communication/Public Utilities
** Finance/Insurance/Real Estate
*** Hotel/Gaming/Recreation

Source: Employment Security Research, Nevada Employment Security Department.

Construction. Construction industry growth has been above average for the past several years. But through September of 1986, the level of construction permits for residential and commercial units has been significantly higher than during either 1984 or 1985. And, for most of this year, permits have even exceeded the 1983 record year. Much of this activity is due to the significant drop in mortgage interest rates, as evidenced by such residential projects as The Lakes, Lakeside Village and others.

FIGURE 5

Las Vegas MSA
Building Permits



Source: Building or Planning Departments within Clark County.

Table 11 reflects that construction employment will likely climb to 16,600 jobs in 1987, a 5.1 percent increase. In addition to new residential construction, many of these new jobs will also be created

by new commercial projects such as St. Louis Square, Buffalo Press, Harrah's Hotel/Casino Laughlin and others.

Manufacturing. Manufacturing, although not gaining in relative employment, continues to maintain its overall share of jobs in the fast growing Las Vegas economy. Growth during 1987 should accelerate to some degree. Manufacturing industry employment is expected to grow by 700, reaching a total of 8,600 jobs in the work force. This is a strong increase of 6.2 percent, significantly more than the 4.4 percent growth for all jobs. Several manufacturers plan to begin or expand operations in the near future. Some of these include Aerojet, Dor-Ways Inc., Ford Aero-Space, Gold Bond Ice Cream, Kidd and Company and Georgia Pacific Corporation.

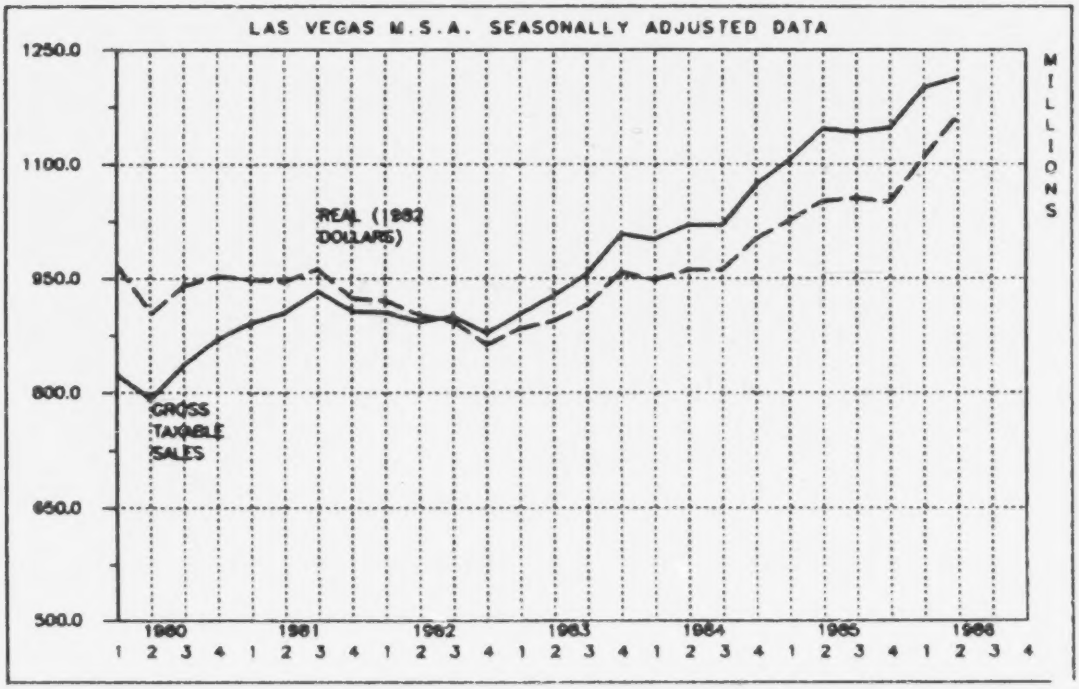
Transportation/Communication/Public Utilities (TCPU). Growth in this industry has been and will continue to be relatively slow. Job gains have been affected by the divestiture of AT&T, where the company cut back on employment; and also by the deregulation of the airline industry, which allowed airlines to change hub locations and thus affect local staffing patterns. But, despite slow growth of new jobs in the air transportation industry, passenger traffic has continued to increase significantly. Despite this, job gains in 1987 should continue to be slow. Industry increases are expected to be 2.7 percent or 400 jobs. This is much less than overall area job growth. Total TCPU employment should average 15,100 jobs during 1987.

Trade. One in every five jobs can be found in the trade industry. A significant number of these jobs are dependent on tourism. Jobs such as those found in eating and drinking establishments and numerous wholesale and retail trade outlets depend on a

strong tourist economy in order to expand. The strong showing of tourism during the past few years, rapid population growth and significant construction gains have provided the stimulus for trade to grow slightly faster than all jobs next year.

FIGURE 6

Las Vegas MSA Taxable Sales



NOTE: Real (1982) dollars derived by deflating gross taxable revenues using the U. S. Consumer Price Index commodities less food index series.

SOURCE: Employment Security Research, Nevada Employment Security Department.

During the first and second quarter of 1986, retail trade in the area was healthy and job gains were strong. During those quarters, total taxable sales were up 8.6 and 6.0 percent respectively over the year. Total taxable sales reached nearly $1.3 billion during the

second quarter. However, the vigor in local sales was not apparent in revenue numbers statewide or in many other areas of the State. For the most part, taxable sales elsewhere were significantly less than anticipated.

During 1987, population growth, coupled with strong tourist numbers and strong construction gains, should bode well for trade as sales should continue to be strong. In addition, an expanding wholesale trade sector and associated warehousing will also contribute to employer demand for new workers. Annual job levels during 1987 should reach 57,500, a 4.5 percent increase over the prior year.

Finance/Insurance/Real Estate (FIRE). Growth in this industry has tapered off somewhat after the strong 1984-1985 growth period. During that time significant new employers such as Citibank created a large increase in the number of jobs in the area. In addition, the resurgence of the construction industry and associated home financing also caused a rapid increase in employment. Despite the current slowdown in employment growth, the industry still appears to be quite healthy. Citibank recently took over the financially insolvent All State Thrift, making it a member of the State's banking community. In addition many financial institutions have undertaken new construction such as the First Interstate Bank Tower, the Nevada National Bank office complex and the Nevada Savings Center. All of these projects will add to the strength of the industry in the future.

During 1987, employment will average 13,700 jobs in Las Vegas. This is an increase of 3.8 percent over 1986. However, it is less than overall industrial job growth of 4.4 percent.

Service. Almost one half of all jobs are in this industry. And,

nearly one third of all jobs are directly found in the hotel/gaming/recreation sector of the service industry. This is the main reason business and government leaders throughout the State are working to diversify Nevada's economy. Reason for concern becomes even more apparent when one considers that a sizable portion of retail trade and other industry employment can also be attributed to tourism. Given these factors, over one half of all jobs in the area are dependent on tourism. This was brought to sharp focus during the last recession when Nevada and Las Vegas gaming employment levels actually declined for the first time in history.

During 1986 visitor numbers reached near record levels as tourist flocked to the area. In addition many hotel/casinos began or announced expansions and/or new projects. The Golden Nugget, Circus Circus, Tropicana, Gold Coast, Harrah's, Holiday Inn and others all fell into this category.

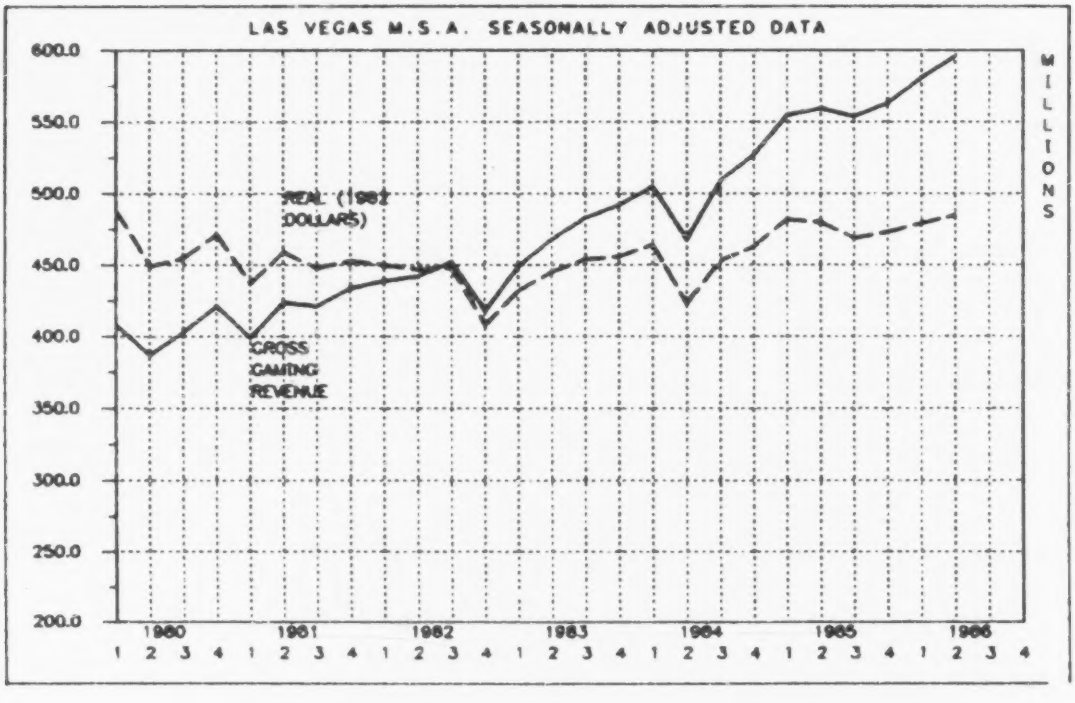
However, despite the large number of tourists and industry expansion, gaming revenue growth was not as expected. Gross gaming revenues during the first two quarters of 1986 were only up 4.8 and 6.3 percent respectively over the year, while increases in the range of 7 to 10 percent were anticipated. But, this does not reflect the whole picture. Despite less than anticipated area gaming revenues in recent quarters, the Las Vegas gaming industry has been the revenue bright spot in the State. Statewide, during the first two quarters in 1986, gains in gross gaming revenues were only 2.9 and 3.4 percent respectively. In addition, many areas of the State actually showed gaming revenue losses over the year during the same two periods.

These statistics raise an interesting question. Why are Las

Vegas gaming revenues sluggish while visitor numbers are setting new records and area sales taxes remain at relatively healthy levels? People are apparently spending less money on gambling during their visits. While definite answers are not immediately forthcoming, some of the reasons given for this phenomenon include a change in visitor demographics such as a higher number of foreign visitors, Expo 86 in Vancouver, Canada, the California lottery and industry maturation.

FIGURE 7

Las Vegas MSA
Gross Gaming Revenues



NOTE: Real (1982) dollars derived by deflating gross gaming revenues using the U. S. Consumer Price Index (CPI) entertainment services index.

SOURCE: Nevada Gaming Control Board.

Nonetheless, Las Vegas job growth in the service industry should continue to be above average during 1987, increasing by 4.7 percent. Accordingly, there will be nearly 6,000 new jobs created in the industry during the year, amounting to around one-half of all new jobs in the area. Service industry employment during 1987 should average 127,400, with the hotel/gaming/recreation sector providing 85,700 of these jobs.

Government. This industry continues to exhibit the effects of tight budgets and subsequent cutbacks. Growth during the past few years has been consistently below the rate of increase in all jobs, despite the fact that Nevada and Las Vegas have one of the fastest growing populations in the nation. Employment levels in government during 1987 should average 31,100 jobs. This is an increase of only 3.0 percent over job levels in 1986.

ECONOMIC DEVELOPMENTS AND OUTLOOK

RENO MSA [4]

The economy in the Truckee Meadows has significantly improved over the year as shown by many economic indicators. During the first nine months of 1986, unemployment, one of the most referenced area economic indicators, has fallen sharply. Job growth for the Truckee Meadows during 1986 compares favorably to that of 1985. Many new businesses have relocated to the area while many others have expanded their operations, adding employees to their payrolls.

Providing impetus to this sustained optimism is an improving national economy. Job growth is approaching a respectable 3 percent. Real Gross National Product is expected to show much improvement during the fourth quarter of 1986 and throughout 1987. Interest rates have been trending downward and during late August the prime interest rate charged by banks to their most creditworthy businesses dropped to 7.5 percent, its lowest level since August 1977. Averages on the New York Stock Exchange and other exchanges have attained high levels and created paper wealth among stockholders. Personal income has also been increasing, giving consumers additional incentive to spend and keep the four-year recovery moving forward. Inflation as measured by the U.S. Consumer Price Index is well below levels of several years ago and during 1986 should only increase between 2.5 and 3.0 percent; this is due to the dramatic drop in the price of oil.

More importantly to Nevada, California's economy has shown

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[4]Metropolitan statistical area is defined as Clark County for the Las Vegas MSA and as Washoe County for the Reno MSA. This usage is consistent throughout the publication.

strength on many economic fronts. Its seasonally adjusted unemployment rate has dropped from its highest 1986 level of 7.1 percent to 6.6 percent in August. It declined further to 6.4 percent in September. These rates continue to be below the national level and are quite favorable given the size of California's labor force.

Area Unemployment. The seasonally adjusted unemployment rate began the year at 6.4 percent before edging upwards to the year's highest level of 6.8 percent in February. This translated into 10,200 individuals who were without employment and approximated the 6.5 percent and 9,700 jobless for the year ago month. However, it should be noted that during February 1986, northern Nevada was severely impacted by inclement weather which closed mountain highways and interrupted tourism travel. Five northern Nevada counties and several California counties were declared emergency disaster areas. Further, airline traffic to the area and tourist counts were quite low at Reno Cannon International Airport where aircraft were not allowed to land or to takeoff. The airport's instrument landing system (ILS) (which helps airplanes to land in inclement weather) had been inoperative and many flights were cancelled or diverted to other airports.

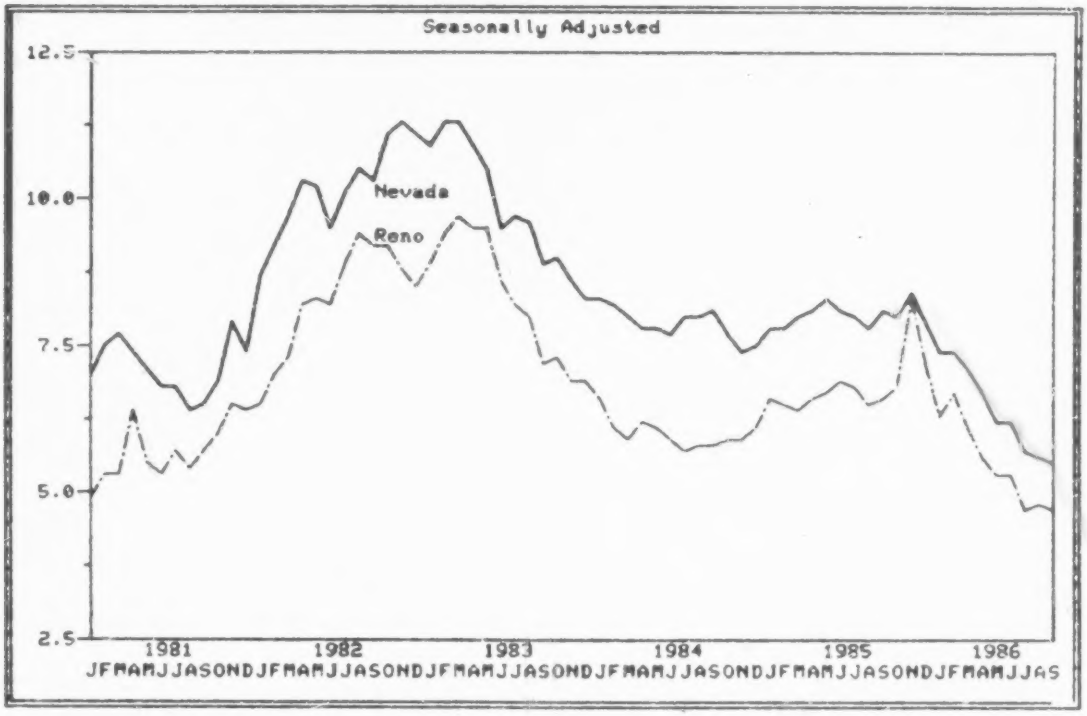
March's jobless statistics were dramatically improved with a drop of seven-tenths of one percentage point to 6.1 percent and a reduction in joblessness of 2,400 individuals. Conditions brightened in the following months as the rate dropped further to 5.3 percent in May and June. In July the unemployment rate declined to 4.7 percent and 5,800 individuals unemployed, the lowest rate since March 1980. Joblessness in August edged upward to 4.8 percent, before dropping once again to 4.7 percent in September.

These rates are relatively low when compared to the rate for Nevada (5.5) and the nation (7.0). Figure 8 indicates a favorable Truckee Meadows unemployment rate when compared to the State rate for the past five years. It is interesting to note that the rates for the two areas were almost equal during November 1985. The Reno rate, 8.3 percent, was at its highest level since June 1983. Since that month, Reno's joblessness has generally followed the trend established for Nevada, although at a slightly lower level.

FIGURE 8

Nevada and Reno MSA

Unemployment Rates



SOURCE: Employment Security Research, Nevada Employment Security Department.

As the area enters the fall and winter months of 1986, this year's jobless rate is expected to seasonally increase. The annual average for 1986 thus should approach the 5.1 to 5.3 percent range, considerably lower than the year earlier rate of 6.8 percent (see table 12).

Labor force. The labor force, next year, is expected to grow by 3.5 to 3.9 percent and should total more than 136,000 individuals. Much impetus for this sustained growth will be due to an expanding population and increased job opportunities.

TABLE 12
Reno MSA Labor Force Summary*
1985 - 1987
(thousands)

	1985	1986	1987	1986 - 1987 Change	1986 - 1987 Change
Total Labor Force	129.4	131.6	136.5	4.9	3.7%
Unemployment	8.9	6.8	7.1	.3	4.4
Unemp. Rate	6.8%	5.2%	5.2%	--	--
Total Employment[1]/	120.5	124.8	129.4	4.6	3.7

1/ Adjusted by Census relationships to reflect number of persons by place of residence.

SOURCE: Employment Security Research, Nevada Employment Security Department.

Establishment-Based Employment. During 1986, the percentage distribution for most establishment-based industrial employment categories (see table 13) is expected to show little change from year earlier statistics. However, the percentage share for the area's principal industry, services, should jump substantially from 39.5 to 41.1 percent. This amount is a record high percentage for the Truckee

Meadows and was attributed to Washoe Medical Center's change in status from a public hospital to a private non-profit organization classified in the service industry. This event also contributed to a sizable decline in the percentage of government jobs, dropping from 13.9 percent in 1985 to 12.1 percent for 1986. The area's second largest industry, wholesale and retail trade, is expected to remain unchanged at 22.5 percent, also an all time record high. The majority of this activity should occur in the retail sector, which saw many new businesses enter the market and established employers expand their operations.

TABLE 13

Reno MSA
Establishment-Based Industrial Employment#
(Percent Distribution)
1983-1986

	1983	1984	1985	1986(e)
Total	100.0%	100.0%	100.0%	100.0%
Mining	0.5	0.6	0.6	0.6
Construction	4.3	4.6	4.9	5.0
Manufacturing	6.7	6.9	6.8	6.7
TCPU*	7.1	6.6	6.5	6.6
Trade	21.8	22.2	22.5	22.5
FIRE**	5.6	5.4	5.3	5.2
Service	39.2	39.6	39.5	41.1
HGR***	24.4	24.6	24.2	24.3
Government	14.8	14.4	13.9	12.1

* Transportation/Communications/Public Utilities.
** Finance/Insurance/Real Estate.
*** Hotels/Gaming/Recreation
e = Estimate
# Reflects employment by place of work. Does not necessarily coincide with labor force concept. Includes multiple job holders.

NOTE: Percentages based on rounded data.

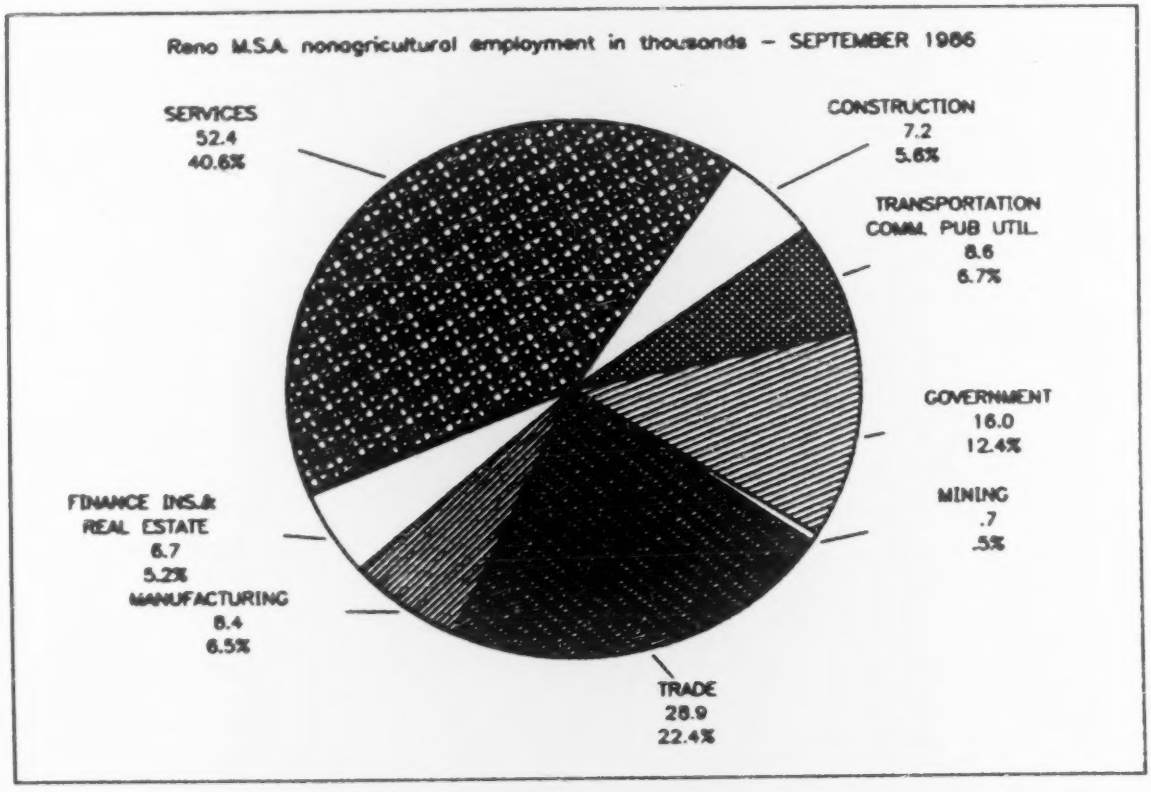
SOURCE: Employment Security Research, Nevada Employment Security Department.

During calendar year 1985, the average number of firms in the Reno area totaled 7,023, 3.0 percent higher than the year earlier average. Of the approximately 200 new establishments, slightly over one-half were classified in the service industry. However, there were only nine new businesses coded to its hotels/gaming/recreation sector (see table 6). Approximately one-fifth of the new employers were in trade while 29 additional firms were doing work in the construction industry. Almost 10 percent of the new firms were classified in finance/insurance/real estate. Trends in 1985 should continue through 1986 with the bulk of the new firms being classified in services. There were about 7,100 firms reported for the first quarter of 1986 with almost 4,700 classified in services and trade.

Figure 9 shows the numeric and percentage distribution of Reno employment by industrial sector for September 1986. As is easily seen, services and trade are the major industries in the area with approximately 78,000 jobs, representing almost two-thirds of total jobs in the Truckee Meadows. The third largest sector is government with 15,600, representing 12.6 percent of all jobs. When analyzing the economy in terms of goods-producing sectors and service-producing sectors, the area has about one out of every eight employees in goods producing while the other seven are in service producing industries.

FIGURE 9

Reno MSA Employment by Industrial Sector



SOURCE: Employment Security Research, Nevada Employment Security Department.

THE 1987 OUTLOOK

Table 14 shows establishment-based industrial employment for 1985 and estimates for 1986 and 1987. Most industrial sectors during 1986 will grow with most job gains ranging from 2.4 percent in manufacturing to 7.9 percent in service. Mining employment should remain unchanged, while government will be down by 9.5 percent. Overall, job growth should improve further, 3.7 percent, in 1987 with all industries showing positive increases except mining, which is expected to change very little.

TABLE 14

Reno MSA
Establishment-Based Industrial Employment #
1985-1987
(thousands)

Industry	1985	1986(e)	Percent Change 1985-1986	1987(e)	Percent Change 1986-1987
Total	121.7	126.0	3.5%	130.7	3.7%
Mining	0.7	0.7	0	0.7	0
Construction	6.0	6.3	5.0	6.6	4.8
Manufacturing	8.3	8.5	2.4	8.8	3.5
TCPU*	7.9	8.3	5.1	8.4	1.2
Trade	27.4	28.4	3.6	29.6	4.2
FIRE**	6.4	6.6	3.1	6.8	3.0
Service	48.1	51.9	7.9	54.1	4.2
HGR***	29.5	30.6	3.7	31.8	3.8
Government	16.9	15.3	-9.5	15.7	2.6

* Transportation/Communications/Public Utilities
** Finance/Insurance/Real Estate
*** Hotels/Gaming/Recreation

e = Estimate

\# Reflects employment by place of work. Does not necessarily coincide with labor force concept. Includes multiple job holders.

Revised annual averages previously unpublished.

Employment Review and Outlook by Industry. The following sections are a more detailed look at each industry's prospects in the coming year.

Mining. Employment during the coming year should approximate 700, the level of the past two years. This is down from its peak of 1,000 during 1980 when the State enjoyed a large amount of exploration activity. Since then, mining has been hard hit nationally, although over the last two years increased activity has been evident in rural

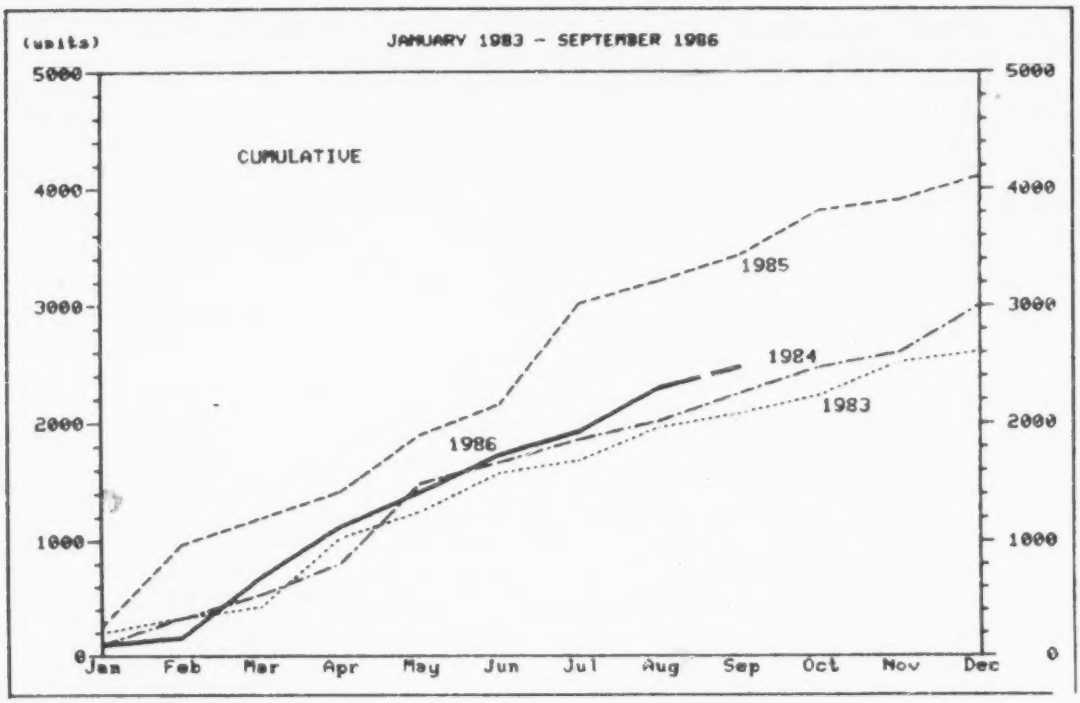
Nevada. Several recent events may help this industry in the future. The U.S. Government has passed legislation to begin minting gold coins, which should renew interest in precious gold mining and exploration. Also, the price of gold has trended upward due in part to proposed economic sanctions against South Africa, a major world producer of gold.

Construction. Employment should continue to show a strong gain during the remainder of 1986, due in part to stable interest rates, a pent-up demand for housing and commercial office space, and an influx of persons moving to the Truckee Meadows. In 1986, growth in construction jobs is estimated to approach 5.0 percent, a healthy gain in view of the negative growth experienced between 1978 through 1983. Due to a continuation of these factors, 1987 job growth should increase by 4.8 percent, approximating the year earlier level, 300 person gain.

Cumulative building permit activity for new and multiple family housing through September 1986 is off by about 39 percent when compared to the 1985 period. This decline occurred in the multiple family category and was due to several large apartment complexes being completed in early 1986. Consequently, permit activity has slowed and is expected to continue until the current vacancy rates are lowered. However, cumulative 1986 permit activity is much greater than for the same period in 1982, 1983, and 1984.

FIGURE 10

RENO MSA BUILDING PERMIT ACTIVITY



SOURCE: Building or Planning Departments within Washoe County.

There are currently several sizable projects in various stages of completion valued at more than $120 million in the Reno area. Expansion of the Peppermill is underway just south of downtown Reno, while a new hotel/casino, the Virginian, is being built in downtown Reno. A consolidated jail/headquarters facility is being built north of Reno for local law enforcement agencies, and an expansion is underway at the joint water-sewer treatment plant in Sparks. This latter project provides impetus for continued job growth for the many shopping centers and office buildings that are being built throughout the Truckee Meadows, some of which will be completed this year. Others will be finished during the coming year. Many highway and roadway

projects were completed this year, while several are scheduled to be completed in early 1987.

Importantly, the moratorium on new hotel/casino projects or expansions was lifted in August 1986. Since this action, several projects have been presented to city/county officials for their consideration. Two hotel/casino projects were announced for a large parcel just south of the Reno Sparks Convention Center. Further, several other hotel/casino projects have received approval for various sites around the area, but construction activity has not yet been started.

Manufacturing. Employment during 1986 will experience its third consecutive increase when compared to the previous year. On a national level, in contrast, the manufacturing industry has not recovered fully from the deep economic recession of 1980-1982. A look at the foreign trade deficit of approximately $150 billion points to continued potential difficulty in the coming year. In the Reno area, despite overall growth, some weakness is apparent. Several large electronic manufacturers have experienced economic difficulty and have subsequently reduced their staff. In addition, other durable goods manufacturers have laid off staff due to lack of business activity. In spite of these occurrences, other manufacturers have relocated their operations to the Truckee Meadows while others have expanded their staffing levels to accommodate increased operations.

During early 1987, R. R. Donneley, a printing establishment located at Stead, just north of Reno, is expected to have completed construction on a multi-million dollar facility. Initial staffing requirements call for an estimated 200 with future hiring needs to

possibly reach 1,000. Based on this alone, employment in manufacturing during 1987 is anticipated to again show positive growth, increasing by 3.5 percent. This is approximately the average rate of increase for all industries in the area.

Transportation/Communication/Public Utilities (TCPU). Employment growth during 1986 is expected to be quite favorable at 5.1 percent. Much of this increase is occurring in the transportation sector which is enjoying benefits from both trucking and airline deregulation. Contributing to this gain was the opening of PSA's air reservation center near the airport, with the hiring of a substantial number of employees. Meanwhile, at the Reno Cannon International Airport, several airlines have increased their payrolls due to expanded operations, while other airlines have initiated service to the Reno area. However, one major airline carrier had gone out of business. Employment levels at Nevada Bell and AT&T have collectively stabilized during the past year after experiencing numerous layoffs and job transfers due to the deregulation of the telephone communication business. Total industry job growth is expected to slow down considerably in 1987 to 1.2 percent, a level that is more sustainable than the year earlier pace.

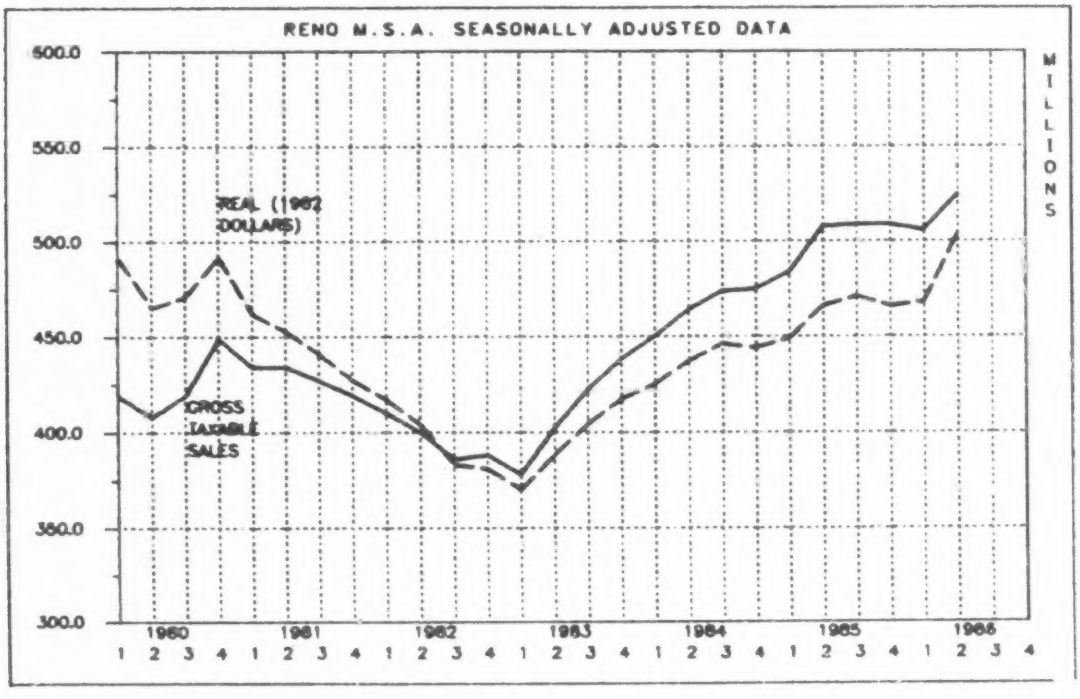
Trade. Employment levels in this industry will also show positive increases between 1985 and 1986. The year-over-year gain should approach 3.6 percent, slightly faster than the average for all industries. This annual growth is slower than experienced during the two previous years, but, nevertheless it is still quite favorable.

As expected, much of the job growth is occurring in the retail trade sector and its eating and drinking component. Good gains have

and will continue to occur in the general merchandise and apparel industry as many establishments expand or start-up among the numerous shopping centers being constructed.

FIGURE 11

Reno MSA Taxable Sales



Note: Real 1982 dollar derived by deflating gross revenues using the U.S. Consumer Price Index (CPI) commodities less food index.

Source: Nevada Department of Taxation.

In 1982 dollars (see figure 11) quarterly taxable sales receipts for the county during the second quarter of 1986 increased by 7.8 percent when compared to the previous quarter. This was the largest

quarterly increase recorded over the past 16 quarters, perhaps signaling future high levels in consumer spending. Continued economic improvements through 1987 portend trade job growth. It is anticipated to rise higher by 4.2 percent. Tourism to the area is expected to continue to grow with a portion of this increase attributed to Southern California marketing strategies developed by local businesses. Many families and households now have two or more wage earners, which should give them additional purchasing power. Further, many homeowners have more disposable income as they are benefiting from lower mortgage payments and lower gasoline prices.

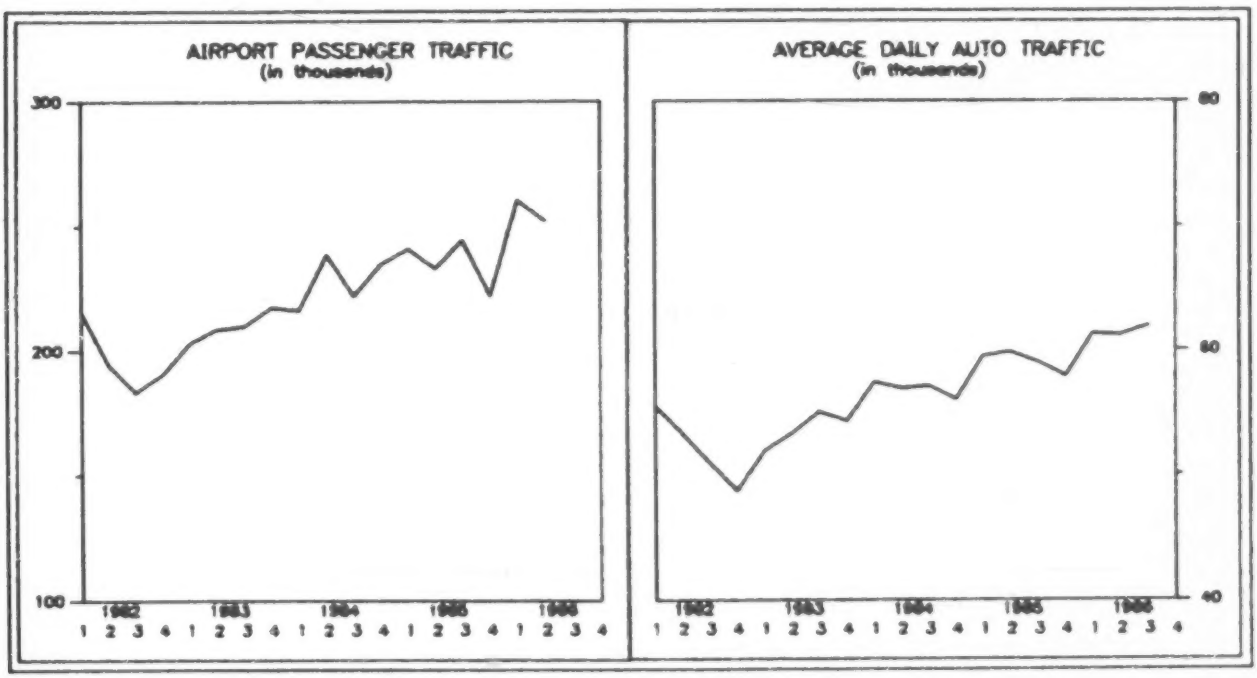
Finance/Insurance/Real Estate (FIRE). Between 1984 and 1985, there was no job growth in this industry. It had enjoyed a very rapid increase between 1983 and 1984, but it was not sustainable even in light of record setting building permit activity. However, this sector should experience a favorable 3.1 percent gain in jobs during 1986 and 3.0 percent in 1987. Contributing factors to this growth are stable interest rates, long-term mortgage rates which have been trending lower, and a prime interest rate which has dropped four times during the past 6 months to its lowest level in nine years. These conditions have led to the refinancing of many residential and commercial loans, virtually inundating all financial institutions. In addition, increased construction activity is providing more business for insurance and real estate establishments. Further, housing resales have provided added stimulus, as according to the Reno Board of Realtors, September 1986 was the highest level of homes sold in one month ever since statistics were first recorded in 1981.

Service. Job growth for the area's number one industry is

anticipated to reach 7.9 percent during 1986. This is the largest year-over-year increase during this decade (a 6.8 percent growth rate was experienced during 1984). As previously mentioned, the bulk of this increase may be attributed to Washoe Medical Center's transfer from a government classification to a service industry classification. Approximately 2,000 workers were involved in the change. Also contributing to the sizable increase were job gains in the hotels/gaming/recreation (HGR) sector. Personal and business services, professional, health care, and educational services have also created jobs.

FIGURE 12

Reno Airport/Vehicle Traffic Counts



* Seasonally Adjusted

Source: Airport Authority of Washoe County; Nevada Department of Transportation.

During 1986, there was only one major hotel/casino, the Peppermill Inn and Casino, that was in the midst of a major expansion (approximately $31 million) of current facilities. In downtown Reno, the Virginian Hotel and Casino, a new multi-million dollar hotel/casino, is now under construction and should be completed next year. These projects had been approved prior to the moratorium on new gaming facilities, which was finally lifted in August 1986.

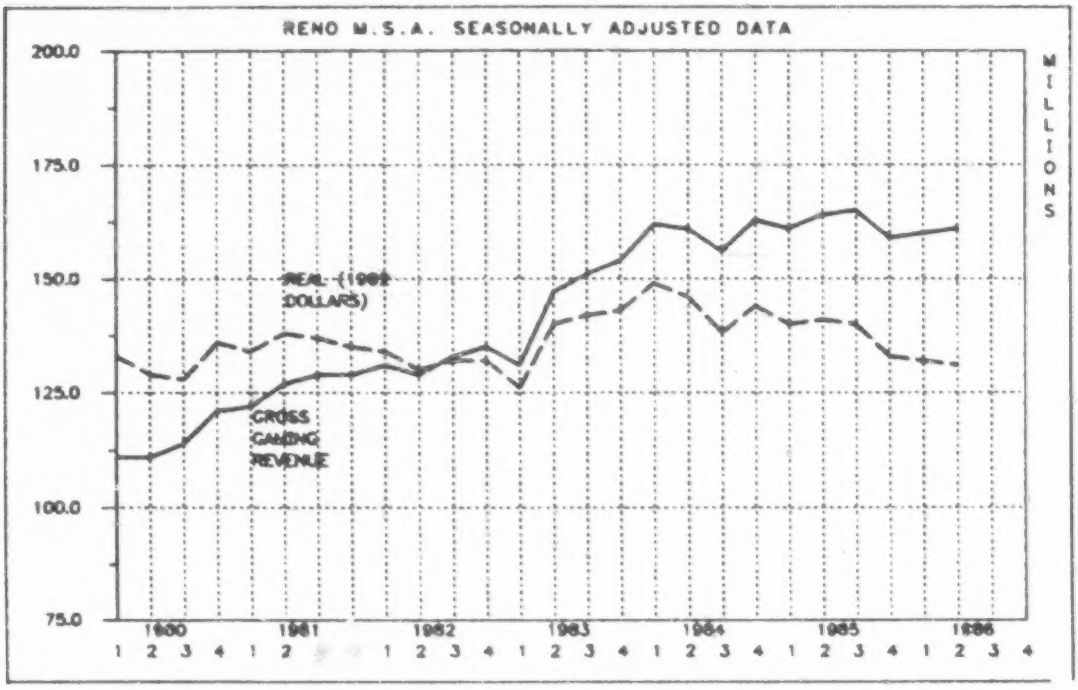
Quarterly gross gaming revenues, in real (1982) dollars, have been relatively flat during the past several years, although some weakness has occurred recently. During the second quarter of 1986, seasonally adjusted revenues were off fractionally from the previous quarter. However, this decrease was the smallest quarter to quarter loss during the past three quarters. On a positive note, tourist visitation appears to be higher.

Cumulative air traffic counts through August are almost 10 percent higher than the previous year. At the same time, cumulative automobile vehicle counts (nine months) are also ahead of year ago levels. Job increases during 1987 for the service industry are expected to be somewhat slower than the rapid pace of 1986. But, gains are expected to approximate 4.2 percent, quicker than the average for all industries.

Government. During 1986, government jobs are expected to drop by almost 10 percent due to a shift in industry classification (see SERVICE industry detail in the above section). This aside, job gains during the coming year are anticipated to be up by almost 2.6 percent. This increase will be the fastest pace since a 5.2 percent annual increase in 1980. Most government entities will share in the job gains as the population continues to expand and the demand for public services increases.

FIGURE 13

Reno MSA Gross Gaming Revenues



Note: Real (1982) dollar derived by deflating gross revenues using the U.S. Consumer Price Index (CPI) entertainment services index.

Source: Nevada Gaming Control Board.

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APPENDIX

STATE OF NEVADA
EMPLOYMENT SECURITY DEPARTMENT

1984
LABOR FORCE SUMMARY
(ESTIMATES IN THOUSANDS)

NEVADA

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
TOTAL LABOR FORCE	482.1	483.2	488.2	491.8	510.2	505.1	505.8	507.6	509.2	506.0	505.4	505.3	500.0
UNEMPLOYMENT	43.7	42.8	40.3	38.3	36.9	38.0	38.1	36.7	37.0	36.8	37.2	42.1	39.0
UNEMPLOYMENT RATE	9.1%	8.9%	8.3%	7.8%	7.2%	7.5%	7.5%	7.2%	7.3%	7.3%	7.4%	8.3%	7.8%
UNEMP. RATE (SEASONALLY ADJUSTED)	8.2%	8.0%	7.9%	7.9%	7.5%	7.5%	7.8%	7.8%	8.0%	7.8%	7.5%	7.8%	7.8%
TOTAL EMPLOYMENT 1/	438.3	440.3	447.9	436.4	463.3	463.7	466.3	469.5	470.8	467.8	466.8	461.8	457.7
NONAGRICULTURAL EMPLOYMENT	434.2	436.2	442.9	430.4	456.9	456.3	458.3	460.9	463.8	461.6	461.9	457.3	451.7
AGRICULTURAL EMPLOYMENT	4.1	4.1	5.0	6.0	6.4	7.4	8.0	8.6	7.0	6.2	4.9	4.5	6.0
PERSONS INVOLVED IN WORK STOPPAGES	0.1	0.1	0.0	17.1	10.0	3.4	1.4	1.4	1.4	1.4	1.4	1.4	3.3

LAS VEGAS SMSA

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
TOTAL LABOR FORCE	274.6	276.0	278.9	286.3	294.0	286.0	284.6	285.4	287.3	285.7	286.5	288.1	284.4
UNEMPLOYMENT	24.9	25.4	24.1	23.0	22.6	24.4	24.7	24.1	24.4	23.4	22.6	25.9	24.1
UNEMPLOYMENT RATE	9.1%	9.2%	8.6%	8.0%	7.7%	8.5%	8.7%	8.4%	8.5%	8.2%	7.9%	9.0%	8.5%
UNEMP. RATE (SEASONALLY ADJUSTED)	8.5%	8.7%	8.7%	8.1%	7.9%	8.5%	8.8%	8.7%	9.0%	8.5%	8.0%	8.3%	8.5%
TOTAL EMPLOYMENT 1/	249.7	250.6	254.8	246.2	261.4	258.2	258.5	259.9	261.5	260.9	262.5	260.8	257.1
NONAGRICULTURAL EMPLOYMENT	248.7	249.4	253.6	244.7	259.9	256.4	256.6	257.8	259.8	259.4	261.3	259.7	255.6
AGRICULTURAL EMPLOYMENT	1.0	1.2	1.2	1.5	1.5	1.8	1.9	2.1	1.7	1.5	1.2	1.1	1.5
PERSONS INVOLVED IN WORK STOPPAGES	0.0	0.0	0.0	17.1	10.0	3.4	1.4	1.4	1.4	1.4	1.4	1.4	3.2

RENO SMSA

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
TOTAL LABOR FORCE	124.8	123.6	125.1	122.2	128.3	128.0	129.2	130.3	131.4	131.4	131.5	130.3	128.0
UNEMPLOYMENT	10.2	9.2	8.6	8.1	7.6	7.1	7.0	6.8	6.8	7.2	8.0	8.9	8.0
UNEMPLOYMENT RATE	8.2%	7.5%	6.9%	6.6%	5.9%	5.6%	5.4%	5.2%	5.2%	5.5%	6.1%	6.8%	6.2%
UNEMP. RATE (SEASONALLY ADJUSTED)	6.8%	6.3%	6.1%	6.5%	6.2%	6.0%	5.8%	6.0%	5.9%	6.1%	6.3%	6.6%	6.2%
TOTAL EMPLOYMENT 1/	114.6	114.4	116.5	114.1	120.7	120.9	122.2	123.5	124.6	124.2	123.5	121.4	120.0
NONAGRICULTURAL EMPLOYMENT	114.1	113.9	115.9	113.3	119.9	120.0	121.2	122.4	123.7	123.4	122.9	120.8	119.2
AGRICULTURAL EMPLOYMENT	0.5	0.5	0.6	0.8	0.8	0.9	1.0	1.1	0.9	0.8	0.6	0.6	0.8
PERSONS INVOLVED IN WORK STOPPAGES	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

1/ ADJUSTED BY CENSUS RELATIONSHIPS TO REFLECT NUMBER OF PERSONS BY PLACE OF RESIDENCE. REVISED MARCH 1986

STATE OF NEVADA
EMPLOYMENT SECURITY DEPARTMENT

1985
LABOR FORCE SUMMARY
(ESTIMATES IN THOUSANDS)

NEVADA

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
TOTAL LABOR FORCE	502.9	498.0	501.8	503.9	509.7	513.3	511.8	514.3	515.6	517.0	518.0	516.8	510.0
UNEMPLOYMENT	43.6	43.6	42.2	41.0	40.6	40.3	39.3	37.7	37.6	38.9	42.6	43.8	41.0
UNEMPLOYMENT RATE	8.7%	8.8%	8.4%	8.1%	8.0%	7.8%	7.7%	7.3%	7.3%	7.5%	8.2%	8.5%	8.0%
UNEMP. RATE (SEASONALLY ADJUSTED)	7.8%	7.8%	8.0%	8.1%	8.3%	8.1%	8.0%	7.8%	8.1%	8.0%	8.4%	7.9%	8.0%
TOTAL EMPLOYMENT 1/	457.9	453.0	459.3	462.6	468.8	472.4	472.4	476.5	477.9	478.0	475.4	473.0	469.0
NONAGRICULTURAL EMPLOYMENT	453.8	448.9	454.3	456.6	462.4	465.0	464.4	467.9	470.9	471.8	470.5	468.5	463.0
AGRICULTURAL EMPLOYMENT	4.1	4.1	5.0	6.0	6.4	7.4	8.0	8.6	7.0	6.2	4.9	4.5	6.0
PERSONS INVOLVED IN WORK STOPPAGES	1.4	1.4	0.3	0.3	0.3	0.6	0.1	0.1	0.1	0.1	0.0	0.0	0.0

LAS VEGAS SMSA

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
TOTAL LABOR FORCE	290.3	284.9	286.9	288.8	291.5	291.2	290.0	291.7	293.7	295.2	295.4	297.5	291.1
UNEMPLOYMENT	25.3	25.4	24.8	24.6	24.8	24.9	24.4	23.9	24.1	24.5	24.6	26.0	24.8
UNEMPLOYMENT RATE	8.7%	8.9%	8.6%	8.5%	8.5%	8.5%	8.4%	8.2%	8.2%	8.3%	8.3%	8.8%	8.5%
UNEMP. RATE (SEASONALLY ADJUSTED)	8.3%	8.4%	8.5%	8.6%	9.0%	8.8%	8.5%	8.4%	8.6%	8.5%	8.4%	8.1%	8.5%
TOTAL EMPLOYMENT 1/	263.6	258.1	261.8	263.9	266.4	265.8	265.6	267.8	269.6	270.7	270.8	271.5	266.3
NONAGRICULTURAL EMPLOYMENT	262.6	257.1	260.6	262.4	264.9	264.0	263.7	265.7	267.9	269.2	269.6	270.4	264.8
AGRICULTURAL EMPLOYMENT	1.0	1.0	1.2	1.5	1.5	1.8	1.9	2.1	1.7	1.5	1.2	1.1	1.5
PERSONS INVOLVED IN WORK STOPPAGES	1.4	1.4	0.3	0.3	0.3	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0

RENO SMSA

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
TOTAL LABOR FORCE	125.9	126.5	127.4	127.3	128.8	130.1	129.7	130.3	130.9	131.5	132.2	130.6	129.4
UNEMPLOYMENT	10.0	9.7	9.2	8.7	8.5	8.3	8.2	7.5	7.4	8.0	10.2	9.9	8.9
UNEMPLOYMENT RATE	7.9%	7.7%	7.2%	6.8%	6.6%	6.4%	6.3%	5.8%	5.7%	6.1%	7.7%	7.6%	6.8%
UNEMP. RATE (SEASONALLY ADJUSTED)	6.6%	6.5%	6.4%	6.6%	6.7%	6.9%	6.8%	6.5%	6.6%	6.8%	8.3%	7.2%	6.8%
TOTAL EMPLOYMENT 1/	115.9	116.8	118.2	118.6	120.3	121.7	121.5	122.8	123.5	123.5	122.0	120.7	120.5
NONAGRICULTURAL EMPLOYMENT	115.4	116.3	117.6	117.8	119.5	120.8	120.5	121.7	122.6	122.7	121.4	120.1	119.7
AGRICULTURAL EMPLOYMENT	0.5	0.5	0.6	0.8	0.8	0.9	1.0	1.1	0.9	0.8	0.6	0.6	0.8
PERSONS INVOLVED IN WORK STOPPAGES	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0

1/ ADJUSTED BY CENSUS RELATIONSHIPS TO REFLECT NUMBER OF PERSONS BY PLACE OF RESIDENCE. REVISED MARCH 1986

1984
NEVADA EMPLOYMENT SUMMARY
(ESTIMATES IN THOUSANDS)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
ESTABLISHMENT BASED IND. EMPLOYMENT 1/	406.1	408.7	415.4	418.7	427.3	430.5	430.5	432.2	436.0	434.8	437.2	434.2	426.0
MINING	6.0	6.1	6.2	6.3	6.5	6.8	6.8	6.9	6.8	6.8	6.9	6.8	6.6
METAL MINING	4.4	4.4	4.4	4.6	4.7	5.0	5.0	5.1	5.0	5.0	4.9	4.8	4.8
CONSTRUCTION	18.4	19.6	21.1	21.9	22.8	23.4	22.9	22.9	22.3	22.4	22.0	22.0	21.8
MANUFACTURING	20.1	20.1	20.3	20.6	20.7	21.2	21.5	21.6	21.6	21.5	21.6	21.7	21.0
DURABLE GOODS	13.2	13.3	13.4	13.6	13.6	14.0	14.2	14.3	14.2	14.0	14.1	14.1	13.8
STONE, CLAY & GLASS PRODUCTS	1.3	1.3	1.4	1.5	1.5	1.5	1.5	1.4	1.3	1.3	1.3	1.3	1.4
PRIMARY METAL INDUSTRIES	1.0	1.0	1.0	1.0	1.0	1.1	1.1	1.2	1.2	1.2	1.2	1.2	1.1
NON-DURABLE GOODS	6.9	6.8	6.9	7.0	7.1	7.2	7.3	7.3	7.4	7.5	7.5	7.6	7.2
FOOD PRODUCTS	1.3	1.3	1.3	1.4	1.4	1.5	1.5	1.5	1.4	1.4	1.4	1.4	1.4
PRINTING & PUBLISHING	3.2	3.2	3.2	3.3	3.2	3.2	3.2	3.3	3.3	3.5	3.5	3.5	3.3
CHEMICALS	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7
TRANSPORTATION & PUBLIC UTIL.	24.2	24.2	24.4	24.5	25.2	25.2	25.4	25.1	24.9	24.9	25.5	25.5	24.9
TRANSPORTATION	12.8	12.8	13.1	13.1	13.6	13.7	13.9	13.7	13.6	13.6	14.2	14.2	13.5
RAILROAD	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4
TRUCKING & WAREHOUSE	3.6	3.7	3.7	3.7	4.0	3.9	4.0	3.8	3.8	4.0	4.5	4.5	3.9
AIR	2.9	2.9	3.0	2.9	2.9	3.0	3.0	2.9	2.9	2.9	2.9	2.9	2.9
PUBLIC UTILITIES	11.4	11.4	11.3	11.4	11.6	11.5	11.5	11.4	11.3	11.3	11.3	11.3	11.4
TOTAL TRADE	82.0	81.5	82.1	83.3	84.8	86.2	87.5	87.7	88.1	87.5	89.4	90.6	85.9
WHOLESALE	14.1	14.1	14.2	14.1	14.4	15.0	14.9	15.1	15.2	15.1	15.3	15.4	14.7
RETAIL	67.9	67.4	67.9	69.2	70.4	71.2	72.6	72.6	72.9	72.4	74.1	75.2	71.2
GENERAL MERCHANDISE & APRL.	13.7	12.9	12.7	12.5	12.6	12.8	12.9	13.1	13.2	13.6	14.8	15.8	13.4
FOOD STORES	9.6	9.5	9.6	9.6	9.8	10.0	10.1	10.1	10.3	10.2	10.2	10.1	9.9
AUTO DEALERS & SERVICE STNS.	8.4	8.5	8.7	8.9	8.9	9.3	9.3	9.4	9.4	9.2	9.1	9.1	9.0
EATING & DRINKING PLACES	22.2	22.4	22.7	23.8	24.4	24.7	25.4	25.1	25.0	24.2	24.3	24.2	24.0
FINANCE, INSURANCE & REAL ESTATE	19.0	19.1	19.3	19.7	19.9	20.2	20.4	20.6	20.5	20.2	20.2	20.3	20.0
FINANCE	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.9	8.8
SERVICE INDUSTRIES	178.5	178.7	182.0	182.7	187.3	189.5	191.5	191.7	192.4	190.9	190.8	186.2	186.9
HOTELS, GAMING & RECREATION	114.1	115.2	117.6	116.7	120.1	121.9	124.0	124.0	124.2	122.7	121.6	118.6	120.1
PERSONAL	5.4	5.5	5.5	5.4	5.3	5.3	5.3	5.4	5.4	5.5	5.5	5.6	5.4
BUSINESS	21.1	19.7	20.2	21.5	22.2	21.9	21.7	21.6	22.2	22.5	23.5	22.0	21.7
MEDICAL & HEALTH	15.5	15.7	15.8	15.9	15.9	16.1	16.0	16.0	16.0	15.9	15.9	16.0	15.9
GOVERNMENT	57.9	59.4	60.0	59.7	60.1	58.0	54.5	55.7	59.4	60.6	60.8	61.1	58.9
FEDERAL	9.6	9.6	9.7	9.8	9.9	10.2	10.3	10.3	10.2	10.1	10.0	10.1	10.0
STATE & LOCAL	48.3	49.8	50.3	49.9	50.2	47.8	44.2	45.4	49.2	50.5	50.8	51.0	48.9
EDUCATION - STATE & LOCAL	20.7	22.1	22.6	22.4	22.7	19.5	16.6	17.0	21.2	22.6	22.8	23.0	21.1

1/ REFLECTS EMPLOYMENT BY PLACE OF WORK. DOES NOT NECESSARILY COINCIDE WITH LABOR FORCE CONCEPT.
INCLUDES MULTIPLE JOBHOLDERS. REVISED 3-86

1985
NEVADA EMPLOYMENT SUMMARY
(ESTIMATES IN THOUSANDS)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
ESTABLISHMENT BASED IND. EMPLOYMENT 1/	429.0	430.0	436.3	440.4	447.0	449.9	448.6	451.7	455.4	454.9	454.1	453.1	445.8
MINING	6.4	6.0	5.9	5.7	5.9	6.1	6.1	6.2	6.3	6.3	6.3	6.4	6.1
METAL MINING	4.5	4.2	4.1	4.1	4.2	4.4	4.4	4.5	4.5	4.5	4.5	4.5	4.4
CONSTRUCTION	20.4	20.8	21.7	23.1	24.3	24.9	24.7	25.7	25.1	24.2	23.2	23.5	23.5
MANUFACTURING	21.4	21.5	21.7	21.6	21.9	22.2	22.2	22.3	22.1	22.0	22.1	22.1	21.9
DURABLE GOODS	14.0	14.1	14.2	14.1	14.4	14.6	14.6	14.6	14.4	14.3	14.2	14.3	14.3
STONE, CLAY & GLASS PRODUCTS	1.3	1.3	1.4	1.4	1.4	1.5	1.5	1.6	1.6	1.6	1.5	1.6	1.5
PRIMARY METAL INDUSTRIES	1.2	1.2	1.2	1.2	1.2	1.1	1.1	1.1	1.0	1.0	1.0	1.0	1.1
NON-DURABLE GOODS	7.4	7.4	7.5	7.5	7.5	7.6	7.6	7.7	7.7	7.7	7.9	7.8	7.6
FOOD PRODUCTS	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4
PRINTING & PUBLISHING	3.4	3.5	3.5	3.4	3.4	3.5	3.4	3.5	3.6	3.7	3.7	3.7	3.5
CHEMICALS	0.7	0.7	0.7	0.7	0.7	0.6	0.6	0.7	0.7	0.6	0.7	0.7	0.7
TRANSPORTATION & PUBLIC UTIL.	24.7	24.7	24.7	24.8	25.2	25.2	25.2	25.3	25.5	25.4	25.4	25.7	25.2
TRANSPORTATION	13.4	13.5	13.5	13.6	13.8	13.9	13.9	14.0	14.2	14.1	14.2	14.5	13.9
RAILROAD	1.4	1.4	1.4	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3
TRUCKING & WAREHOUSE	3.8	3.8	3.8	3.7	3.8	3.8	3.8	3.7	3.8	3.9	3.9	4.2	3.8
AIR	2.9	2.8	2.9	2.9	3.0	3.0	2.9	3.0	3.0	3.0	3.0	3.1	3.0
PUBLIC UTILITIES	11.3	11.2	11.2	11.2	11.4	11.3	11.3	11.3	11.3	11.3	11.2	11.2	11.3
TOTAL TRADE	87.0	86.7	88.1	88.7	90.4	91.9	91.9	92.1	92.4	92.8	94.7	95.9	91.0
WHOLESALE	15.0	15.1	15.5	15.7	15.9	16.1	16.1	16.1	16.0	16.0	16.1	16.0	15.8
RETAIL	72.0	71.6	72.6	73.0	74.5	75.8	75.8	76.0	76.4	76.8	78.6	79.9	75.2
GENERAL MERCHANDISE & APRL.	13.9	13.4	13.2	12.9	13.2	13.4	13.4	13.4	13.7	14.2	15.6	16.6	13.9
FOOD STORES	10.1	10.0	10.1	10.3	10.5	10.7	10.7	10.7	10.8	10.9	11.1	11.2	10.6
AUTO DEALERS & SERVICE STNS.	9.0	9.1	9.3	9.2	9.3	9.6	9.7	9.8	9.7	9.6	9.5	9.6	9.5
EATING & DRINKING PLACES	23.6	23.7	24.4	24.8	25.5	26.1	26.1	26.1	26.2	25.8	25.7	25.6	25.3
FINANCE, INSURANCE & REAL ESTATE	20.3	20.5	20.9	21.0	21.3	21.7	21.8	22.0	22.1	22.2	22.2	22.2	21.5
FINANCE	9.0	9.1	9.1	9.2	9.3	9.4	9.4	9.5	9.6	9.8	9.8	9.8	9.4
SERVICE INDUSTRIES	189.4	189.1	192.0	194.2	196.2	198.1	199.5	200.9	200.6	199.2	199.2	196.0	196.2
HOTELS, GAMING & RECREATION	120.6	121.2	122.6	124.5	125.9	127.6	128.8	129.5	128.9	127.3	125.7	122.4	125.4
PERSONAL	5.5	5.6	5.7	5.7	5.7	5.7	5.7	5.7	5.7	5.6	5.6	5.5	5.6
BUSINESS	22.8	21.5	21.8	22.3	22.5	22.2	22.5	23.0	23.1	23.2	22.8	22.8	22.5
MEDICAL & HEALTH	16.2	16.3	16.6	16.6	16.8	17.0	16.9	17.0	17.1	17.3	19.2	19.2	17.2
GOVERNMENT	59.4	60.7	61.3	61.3	61.8	59.8	57.2	57.2	61.3	62.8	61.0	61.3	60.4
FEDERAL	10.1	10.1	10.1	10.2	10.3	10.6	10.7	10.6	10.4	10.5	10.4	10.4	10.4
STATE & LOCAL	49.3	50.6	51.2	51.1	51.5	49.2	46.5	46.6	50.9	52.3	50.6	50.9	50.0
EDUCATION - STATE & LOCAL	21.2	22.2	22.7	22.6	22.9	20.1	17.2	17.2	21.8	23.4	23.7	23.8	21.6

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INCLUDES MULTIPLE JOBHOLDERS. REVISED 3-86

1984
LAS VEGAS EMPLOYMENT SUMMARY
(ESTIMATES IN THOUSANDS)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
ESTABLISHMENT BASED IND. EMPLOYMENT 1/	231.9	231.3	235.3	235.6	241.0	240.2	239.8	239.3	242.4	243.0	246.7	244.9	239.2
MINING	0.3	0.3	0.3	0.3	0.4	0.4	0.3	0.3	0.3	0.3	0.3	0.3	0.3
CONSTRUCTION	12.2	12.5	13.7	14.0	14.2	14.2	13.6	13.4	12.9	12.9	12.8	13.0	13.3
MANUFACTURING	7.3	7.2	7.3	7.4	7.5	7.6	7.5	7.6	7.5	7.5	7.6	7.6	7.5
DURABLE GOODS	4.0	4.0	4.0	4.1	4.2	4.2	4.2	4.2	4.1	4.1	4.1	4.1	4.1
STONE, CLAY & GLASS PRODUCTS	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.6	0.6	0.6	0.6	0.7
NON-DURABLE GOODS	3.3	3.2	3.3	3.3	3.3	3.4	3.3	3.4	3.4	3.4	3.5	3.5	3.4
FOOD PRODUCTS	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
PRINTING & PUBLISHING	1.6	1.6	1.6	1.6	1.6	1.6	1.6	1.6	1.6	1.7	1.7	1.7	1.6
CHEMICALS	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
TRANSPORTATION & PUBLIC UTIL.	13.8	13.7	13.8	14.0	14.5	14.3	14.5	14.2	14.1	14.2	14.9	14.8	14.2
TRANSPORTATION	7.8	7.7	7.8	7.9	8.2	8.2	8.4	8.1	8.0	8.1	8.7	8.6	8.1
RAILROAD	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
AIR	2.4	2.4	2.4	2.3	2.3	2.4	2.4	2.3	2.3	2.3	2.3	2.3	2.3
PUBLIC UTILITIES	6.0	6.0	6.0	6.1	6.3	6.1	6.1	6.1	6.1	6.1	6.2	6.2	6.1
TOTAL TRADE	47.4	47.2	47.3	47.7	48.6	49.0	49.4	49.2	49.4	49.4	51.0	51.7	48.9
WHOLESALE	7.1	7.2	7.2	7.3	7.5	7.6	7.5	7.6	7.6	7.6	7.8	7.8	7.5
RETAIL	40.3	40.0	40.1	40.4	41.1	41.4	41.9	41.6	41.8	41.8	43.2	43.9	41.4
GENERAL MERCHANDISE & APRL.	7.8	7.4	7.2	7.0	7.1	7.2	7.2	7.3	7.4	7.6	8.4	8.9	7.5
EATING & DRINKING PLACES	13.7	13.8	13.9	14.6	15.0	15.0	15.3	15.0	14.9	14.7	15.0	15.0	14.7
FINANCE, INSURANCE & REAL ESTATE	11.1	11.1	11.3	11.4	11.5	11.6	11.7	11.8	11.8	11.9	12.0	12.2	11.6
FINANCE	4.8	4.8	4.9	4.8	4.8	4.8	4.8	4.8	4.8	4.9	5.0	5.0	4.9
SERVICE INDUSTRIES	112.1	111.2	113.0	112.2	115.4	115.6	116.8	116.5	118.2	117.8	118.9	116.0	115.3
HOTELS, GAMING & RECREATION	71.8	71.9	73.0	70.7	73.0	73.5	74.9	74.8	76.0	75.3	75.5	74.2	73.7
PERSONAL	3.1	3.2	3.2	3.2	3.2	3.1	3.2	3.2	3.2	3.2	3.2	3.2	3.2
BUSINESS	15.0	13.7	14.1	15.2	15.7	15.2	15.0	14.8	15.5	15.9	16.8	15.3	15.2
GOVERNMENT	27.7	28.1	28.6	28.6	28.9	27.5	26.0	26.3	28.2	29.0	29.2	29.3	28.1
FEDERAL	5.0	5.0	5.1	5.1	5.2	5.3	5.2	5.3	5.2	5.2	5.2	5.2	5.2
STATE & LOCAL	22.7	23.1	23.5	23.5	23.7	22.2	20.8	21.0	23.0	23.8	24.0	24.1	22.9
EDUCATION - STATE & LOCAL	10.6	10.9	11.2	11.3	11.4	9.5	8.0	8.4	10.6	11.4	11.5	11.6	10.5

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INCLUDES MULTIPLE JOBHOLDERS. REVISED 3-86

1985
LAS VEGAS EMPLOYMENT SUMMARY
(ESTIMATES IN THOUSANDS)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
ESTABLISHMENT BASED IND. EMPLOYMENT 1/	244.4	244.9	248.4	251.4	254.1	253.6	253.3	254.5	257.2	257.8	258.8	259.7	253.2
MINING	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
CONSTRUCTION	12.5	13.0	13.4	14.2	14.7	15.0	15.1	15.6	15.2	14.7	14.6	14.8	14.4
MANUFACTURING	7.4	7.5	7.6	7.7	7.8	8.0	8.0	8.1	8.1	8.0	7.9	8.0	7.8
DURABLE GOODS	4.0	4.2	4.2	4.3	4.4	4.5	4.5	4.5	4.4	4.3	4.2	4.3	4.3
STONE, CLAY & GLASS PRODUCTS	0.7	0.7	0.7	0.7	0.7	0.7	0.8	0.8	0.8	0.8	0.8	0.8	0.8
NON-DURABLE GOODS	3.4	3.3	3.4	3.4	3.4	3.5	3.5	3.6	3.7	3.7	3.7	3.7	3.5
FOOD PRODUCTS	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.7	0.6	0.7	0.7	0.6
PRINTING & PUBLISHING	1.6	1.6	1.6	1.6	1.6	1.7	1.7	1.7	1.8	1.9	1.8	1.8	1.7
CHEMICALS	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
TRANSPORTATION & PUBLIC UTIL.	14.1	14.0	14.0	14.2	14.5	14.4	14.4	14.4	14.6	14.5	14.5	14.6	14.4
TRANSPORTATION	8.0	8.1	8.0	8.2	8.3	8.4	8.3	8.3	8.5	8.4	8.4	8.5	8.3
RAILROAD	0.5	0.5	0.5	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
AIR	2.3	2.2	2.2	2.3	2.3	2.3	2.3	2.3	2.4	2.3	2.4	2.3	2.3
PUBLIC UTILITIES	6.1	5.9	6.0	6.0	6.2	6.0	6.1	6.1	6.1	6.1	6.1	6.1	6.1
TOTAL TRADE	49.9	50.1	51.1	51.3	52.1	52.7	52.7	52.6	53.1	53.4	54.6	55.6	52.4
WHOLESALE	7.8	7.9	8.1	8.3	8.4	8.6	8.7	8.6	8.6	8.6	8.6	8.6	8.4
RETAIL	42.1	42.2	43.0	43.0	43.7	44.1	44.0	44.0	44.5	44.8	46.0	47.0	44.0
GENERAL MERCHANDISE & APRL.	7.8	7.6	7.6	7.4	7.6	7.8	7.7	7.6	7.7	7.9	8.7	9.2	7.9
EATING & DRINKING PLACES	14.8	15.0	15.4	15.5	15.7	15.8	15.9	16.0	16.3	16.2	16.4	16.4	15.8
FINANCE, INSURANCE & REAL ESTATE	12.1	12.3	12.5	12.5	12.7	12.9	13.0	13.2	13.2	13.3	13.3	13.3	12.9
FINANCE	5.1	5.2	5.2	5.3	5.4	5.5	5.6	5.7	5.7	5.8	5.8	5.8	5.5
SERVICE INDUSTRIES	119.7	118.6	120.0	121.6	122.3	121.7	122.5	122.9	123.3	123.1	123.0	122.3	121.8
HOTELS, GAMING & RECREATION	76.5	76.4	77.1	78.3	78.6	78.1	78.6	78.6	78.8	78.2	78.3	77.4	77.9
PERSONAL	3.3	3.4	3.5	3.5	3.4	3.4	3.5	3.5	3.5	3.5	3.5	3.4	3.5
BUSINESS	16.3	14.9	15.3	15.6	15.6	15.2	15.6	15.9	15.9	16.0	15.7	15.9	15.7
GOVERNMENT	28.4	29.1	29.5	29.6	29.7	28.6	27.3	27.4	29.4	30.5	30.6	30.8	29.2
FEDERAL	5.2	5.3	5.3	5.4	5.4	5.4	5.5	5.5	5.5	5.6	5.6	5.6	5.4
STATE & LOCAL	23.2	23.8	24.2	24.2	24.3	23.2	21.8	21.9	23.9	24.9	25.0	25.2	23.8
EDUCATION - STATE & LOCAL	10.8	11.2	11.6	11.6	11.5	10.2	8.6	8.5	10.9	12.0	12.1	12.2	10.9

1/ REFLECTS EMPLOYMENT BY PLACE OF WORK. DOES NOT NECESSARILY COINCIDE WITH LABOR FORCE CONCEPT.
INCLUDES MULTIPLE JOBHOLDERS. REVISED 3-86

1984
RENO EMPLOYMENT SUMMARY
(ESTIMATES IN THOUSANDS)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
ESTABLISHMENT BASED IND. EMPLOYMENT 1/	111.3	113.1	114.9	116.4	118.5	119.6	120.2	120.9	121.7	120.6	120.5	120.0	118.1
MINING	0.6	0.6	0.6	0.7	0.7	0.8	0.8	0.8	0.8	0.8	0.8	0.7	0.7
CONSTRUCTION	4.2	4.4	4.6	5.2	5.5	5.8	6.0	6.0	6.0	5.9	5.8	5.7	5.4
MANUFACTURING	7.9	7.9	7.9	7.9	8.0	8.1	8.3	8.3	8.3	8.2	8.3	8.4	8.1
DURABLE GOODS	5.5	5.5	5.5	5.4	5.5	5.6	5.7	5.7	5.6	5.5	5.6	5.6	5.5
NON-DURABLE GOODS	2.4	2.4	2.4	2.5	2.5	2.5	2.6	2.6	2.7	2.7	2.7	2.8	2.6
TRANSPORTATION & PUBLIC UTIL.	7.8	7.8	7.8	7.8	7.9	8.0	7.9	8.0	7.9	7.8	7.8	7.9	7.8
TRANSPORTATION	3.8	3.9	3.9	3.8	3.9	4.0	3.9	4.0	4.0	3.9	4.0	4.1	3.9
RAILROAD	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
TRANSPORTATION EXCL. RAIL.	3.4	3.5	3.5	3.4	3.5	3.6	3.5	3.6	3.6	3.5	3.6	3.7	3.5
PUBLIC UTILITIES	4.0	3.9	3.9	4.0	4.0	4.0	4.0	4.0	3.9	3.9	3.8	3.8	3.9
TOTAL TRADE	24.9	24.7	25.0	25.3	25.5	25.9	26.7	26.9	27.1	27.0	27.4	28.0	26.2
WHOLESALE	5.8	5.7	5.8	5.9	5.9	6.1	6.1	6.2	6.2	6.2	6.2	6.3	6.0
RETAIL	19.1	19.0	19.2	19.4	19.6	19.8	20.6	20.7	20.9	20.8	21.2	21.7	20.2
GENERAL MERCHANDISE & APRL.	5.0	4.7	4.7	4.5	4.5	4.6	4.6	4.8	4.8	5.1	5.5	5.9	4.9
EATING & DRINKING PLACES	5.4	5.5	5.7	5.8	5.9	5.8	6.2	6.2	6.2	5.9	5.9	5.8	5.9
FINANCE, INSURANCE & REAL ESTATE	6.2	6.3	6.3	6.5	6.5	6.6	6.6	6.6	6.5	6.3	6.2	6.2	6.4
SERVICE INDUSTRIES	43.4	44.4	45.6	46.3	47.5	48.2	48.4	48.6	48.4	47.5	46.9	45.8	46.8
HOTELS, GAMING & RECREATION	26.3	27.3	28.3	28.9	29.9	30.2	30.4	30.2	30.0	29.5	28.8	27.7	29.0
PERSONAL	1.7	1.7	1.7	1.6	1.6	1.6	1.5	1.6	1.6	1.6	1.6	1.7	1.6
GOVERNMENT	16.3	17.0	17.1	16.7	16.9	16.2	15.5	15.7	16.7	17.1	17.3	17.3	16.7
FEDERAL	2.7	2.7	2.7	2.7	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8
STATE & LOCAL	13.6	14.3	14.4	14.0	14.1	13.4	12.7	12.9	13.9	14.3	14.5	14.5	13.9
EDUCATION - STATE & LOCAL	6.4	7.1	7.2	7.1	7.1	6.3	5.4	5.5	6.7	7.2	7.3	7.3	6.7

1/ REFLECTS EMPLOYMENT BY PLACE OF WORK. DOES NOT NECESSARILY COINCIDE WITH LABOR FORCE CONCEPT.
INCLUDES MULTIPLE JOBHOLDERS. REVISED 3-86

1985
RENO EMPLOYMENT SUMMARY
(ESTIMATES IN THOUSANDS)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG
ESTABLISHMENT BASED IND. EMPLOYMENT 1/	116.9	117.6	119.3	120.3	122.1	123.4	122.9	123.9	125.1	124.9	124.1	123.2	122.0
MINING	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7
CONSTRUCTION	5.1	5.1	5.3	5.7	6.1	6.3	6.3	6.5	6.5	6.4	5.7	5.8	5.9
MANUFACTURING	8.4	8.4	8.5	8.3	8.4	8.3	8.3	8.3	8.2	8.1	8.2	8.2	8.3
DURABLE GOODS	5.6	5.6	5.7	5.6	5.6	5.6	5.6	5.6	5.5	5.4	5.4	5.4	5.6
NON-DURABLE GOODS	2.8	2.8	2.8	2.7	2.8	2.7	2.7	2.7	2.7	2.7	2.8	2.8	2.7
TRANSPORTATION & PUBLIC UTIL.	7.9	7.9	7.9	7.8	7.8	7.9	7.9	7.9	7.8	7.8	7.9	8.1	7.9
TRANSPORTATION	4.0	4.0	4.0	3.9	3.9	4.0	4.0	4.0	4.0	4.0	4.1	4.3	4.0
RAILROAD	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
TRANSPORTATION EXCL. RAIL.	3.6	3.6	3.6	3.5	3.5	3.6	3.6	3.6	3.6	3.6	3.7	3.9	3.6
PUBLIC UTILITIES	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.8	3.8	3.8	3.8	3.9
TOTAL TRADE	26.7	26.2	26.4	26.7	27.1	27.5	27.7	27.9	27.9	28.2	28.7	29.1	27.5
WHOLESALE	6.0	6.0	6.1	6.2	6.2	6.2	6.3	6.4	6.4	6.4	6.4	6.5	6.3
RETAIL	20.7	20.2	20.3	20.5	20.9	21.3	21.4	21.5	21.5	21.8	22.3	22.6	21.2
GENERAL MERCHANDISE & APRL.	5.1	4.8	4.6	4.5	4.6	4.6	4.6	4.7	4.9	5.1	5.6	6.0	4.9
EATING & DRINKING PLACES	5.7	5.6	5.7	5.9	6.0	6.3	6.3	6.2	6.1	5.9	5.8	5.7	5.9
FINANCE, INSURANCE & REAL ESTATE	6.2	6.2	6.3	6.3	6.4	6.5	6.5	6.5	6.6	6.6	6.5	6.5	6.4
SERVICE INDUSTRIES	45.2	45.7	46.5	47.6	48.2	49.5	49.8	50.4	50.2	49.7	50.8	49.0	48.6
HOTELS, GAMING & RECREATION	27.4	27.8	28.3	29.0	29.5	30.4	30.6	31.1	30.9	30.5	29.8	28.1	29.5
PERSONAL	1.6	1.6	1.6	1.6	1.5	1.5	1.5	1.5	1.4	1.4	1.4	1.4	1.5
GOVERNMENT	16.7	17.4	17.7	17.2	17.4	16.7	15.7	15.7	17.2	17.4	15.6	15.8	16.7
FEDERAL	2.9	2.9	2.9	2.8	2.9	2.9	2.9	2.9	2.8	2.8	2.8	2.9	2.9
STATE & LOCAL	13.8	14.5	14.8	14.4	14.5	13.8	12.8	12.8	14.4	14.6	12.8	12.9	13.8
EDUCATION - STATE & LOCAL	6.6	7.3	7.4	7.2	7.2	6.3	5.5	5.5	6.9	7.3	7.5	7.5	6.9

1/ REFLECTS EMPLOYMENT BY PLACE OF WORK. DOES NOT NECESSARILY COINCIDE WITH LABOR FORCE CONCEPT.
INCLUDES MULTIPLE JOBHOLDERS. REVISED 3-86

LABOR MARKET TERMS AND CONCEPTS

COVERED EMPLOYMENT (STATE): Employment in any industry insured under the provisions of the Nevada Unemployment Compensation Law.

EARNINGS:

> Average Wage is the wage for a given area derived from the covered employment and payroll information. It is computed by dividing the total payroll (in dollars) by total employment. This number can be derived for all industries or individual sectors.

ECONOMICALLY DISADVANTAGED INDIVIDUAL: The term "economically disadvantaged" replaces both "poor" and "disadvantaged" for all Employment and Training Administration programs. It is defined as follows: an individual who is a member of a family (1) which receives cash welfare payments, or (2) whose annual income in relation to family size and location does not exceed the most recently established poverty levels determined in accordance with criteria established by the Office of Management and Budget (OMB).

EMPLOYMENT AND UNEMPLOYMENT:

1. Labor Force consists of all persons 16 years of age or over within a specified geographic area who are either employed or unemployed.

    a. Employed Persons comprise (1) all individuals during a specified week, who did any work at all as paid employees or in their own business or profession, or on their own farm, or who worked 15 hours or more as unpaid workers on a farm or in a business operated by a member of the family, and (2) all those who were not working but who had jobs or businesses from which they were temporarily absent because of illness, bad weather, vacation, or labor-management dispute, or because they were taking time off for personal reasons, whether or not they were seeking other jobs. Excluded from the employed group are persons whose only activity consisted of work around the house (such as own home housework painting, or repairing own homes, etc.), and volunteer work for religious, charitable, and similar organizations.

    b. Unemployed Persons are those individuals who, during a specified week, had no employment but were available for work and (1) had engaged in any specific jobseeking activity within the past four weeks, such as registering at a public or private employment office, meeting with prospective employers, checking with friends or relatives, placing or answering advertisements, writing letters of applications or being on a union or professional register; (2) were waiting to be called back

to a job from which they had been laid off; or (3) were waiting to report to a new wage or salary job within 30 days.

c. Unemployment Rate: The unemployment rate represents the number of unemployed as a percent of the labor force, i.e., the sum of the employed and the unemployed. The seasonally-adjusted unemployment rate eliminates the influence of regularly recurring seasonal fluctuations which can be ascribed to weather, crop-growing cycles, holidays, vacations, regular industry model changeover periods, and the like, and, therefore, more clearly shows the underlying basic trend of unemployment.

d. Labor Force Participation Rate: The proportion of the total civilian noninstitutional population or of a demographic subgroup of that population classified as "in the labor force."

2. Nonagricultural Wage and Salary Employment (Establishment-Based Industrial Employment) includes all full-time and part-time employees of all classes (including employees on paid vacation or paid sick leave) who work in or receive compensation from nonagricultural establishments for any part of the pay period including the 12th of the month. It does not include pensioners, members of the armed forces, self-employed or unpaid family workers, and persons on leave of absence without pay.

JOURNEY LEVEL - A generic term used to describe a fully qualified worker at a trade.

LABOR DEMAND, as used for labor market analysis and for labor force projections, is a term used to describe the volume and trend of job opportunities which exist, and are expected to be available over a given period of time.

1. Expansion Demand - The new job openings created by expansion in a given occupation or industry.

2. Replacement Demand - The number of jobs resulting from workers leaving the labor force permanently, or for an extended duration, by reason of disability, retirement, emigration, death, or entry into the military.

LABOR SUPPLY is the number of workers either unemployed and actively seeking work or who would actively seek work if they believed jobs to be available.

LOCATION QUOTIENT. The location quotient is a numerical measure of the relative importance of an industrial sector in a local economy compared to the importance of the same sector in the statewide economy. It is the ratio of an areas' industrial sector's percent distribution to the state's industrial sectors percent distribution.

For instance: the construction industry represents 5.30 percent of all jobs in Las Vegas and 4.86 percent of all jobs at the statewide level, therefore, the location quotient would be the ratio 5.30/4.86, which equals 1.09.

If the location quotient is equal to one, the relative share of employment in the area industry is equal to that of the State as a whole. A quotient less than one indicates the area industry has a lesser degree of importance than the industry statewide. Conversely, if the quotient is greater than one, the industrial sector in question is relatively more important in the area than in the State.

OCCUPATION - The name or title of a job that identified the various activities and functions of the worker.

a. CLERICAL OCCUPATIONS - Jobs in any industry group concerned with preparing, transcribing, transferring, systematizing, and preserving written communications and records; collecting accounts; distributing information; and influencing customers in favor of a commodity or service.

b. INDUSTRIAL OCCUPATIONS - Jobs in processing, machine trades, bench work, structural work, and various miscellaneous occupations in transportation, packaging and warehousing, utilities, recreational services, mining, logging, and graphic arts.

c. PROFESSIONAL, TECHNICAL, & MANAGERIAL OCCUPATIONS - Jobs in any industry concerned with theoretical or practical aspects of such fields as art, administrative,managerial, and technical work. Most of these occupations require substantial education preparation.

d. SALES OCCUPATIONS - Jobs that involve selling, and such occupations closely identified with sales transaction such as buyers, auctioneers, shoppers, demonstrators, models, and window trimmers.

e. SERVICE OCCUPATIONS - One of a category of jobs in private households, institutions, recreation and commercial, and other establishments serving individuals, or protecting the public against crime, fire, accidents, and acts of war. Significant occupations include guards, porters, coametologists, kitchen workers, and hospital attendants. Professional, technical and managerial jobs are excluded.

QUALIFIED - Able to meet education, experience, and performance standards set by the employer.

SEASONAL ADJUSTMENTS are statistical modifications made to compensate for predictable fluctuations which recur more or less regularly every year in a time series such as unemployment rates. These fluctuations can be so strong as to disrupt the underlying changes in trends. For this reason unemployment rates are reported on a seasonally adjusted basis, compensating for such influences as the summer closing of schools, temporary hiring for the holiday season, seasonal style changes, and the like. Such adjustments facilitate the evaluation of the more important underlying reasons for month-to-month changes in joblessness.

SHORTAGE OCCUPATIONS are those for which recruitment needs cannot be met within a reasonable time period because of the lack of qualified workers. The persistence of a large number of openings is not always in itself a sign of worker shortages. Occupations which traditionally show extremely high turnover, and low paying, dead-end occupations which most jobseekers avoid if given a chance, present recruitment problems that are unrelated to the availability of labor. The term "shortage" relates as much to the quality as to the quantity of the demand, which needs to be evaluated in terms of hiring practices, entry requirements, prevailing standards, earnings potential, seasonality, and the like.

NEVADA EMPLOYMENT SECURITY DEPARTMENT
EMPLOYMENT SECURITY RESEARCH SECTION
500 EAST THIRD STREET
CARSON CITY, NEVADA 89713
(702)885-4550, or in-state toll free
1-800-992-0900 extension 4550

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/_/ /_/ ECONOMIC UPDATE - A quarterly report of labor force estimates and other pertinent economic facts.

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/_/ /_/ OCCUPATIONAL TRAINING DIRECTORY - Presents information on public and private schools offering vocational training, including courses, fees and application procedures. Published biennially.

/_/ /_/ HIGH PROFILE OCCUPATIONS - Individual publications describing selected jobs within broad occupational categories. Published as needed.

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/_/ NEVADA STATE GOVERNMENT - Presents procedures for securing employment with the State of Nevada. Published as needed.

/_/ DIRECTORY OF LABOR MARKET INFORMATION - Listing of labor market references nationally and in Nevada; titles and associated publication contents are described. Published as needed.

NEVADA EMPLOYMENT SECURITY DEPARTMENT LOCAL OFFICES

The Nevada Employment Security Department maintains full-service employment centers at the following locations:

Carson City
1931 North Carson Street
P.O. Box 1787
Carson City, Nevada 89701
Phone: 702-885-4560

Elko
172 Sixth Street
Elko, Nevada 89801
Phone: 702-738-7146

Ely
480 Campton Street
Ely, Nevada 89301
Phone: 702-289-3023

Fallon
101 North Maine Street
Fallon, Nevada 89406
Phone: 702-423-5115

Henderson
119 Water Street
Henderson, Nevada 89015
Phone: 702-564-1054

Incline Village
894 Southwood Boulevard
P.O. Drawer E
Incline Village, Nevada 89450
Phone: 702-831-4156

Las Vegas
135 South 8th Street
Las Vegas, Nevada 89101
Phone: 702-385-3211

North Las Vegas
2827 Las Vegas Boulevard, North
North Las Vegas, Nevada 89030
Phone: 702-649-4238

Reno
70 West Taylor Street
Reno, Nevada 89520
Phone: 702-789-0400

Sparks
2010 Oddie Boulevard
Sparks, Nevada 89431
Phone: 702-789-0411

Winnemucca
401 Bridge Street
Winnemucca, Nevada 89445
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